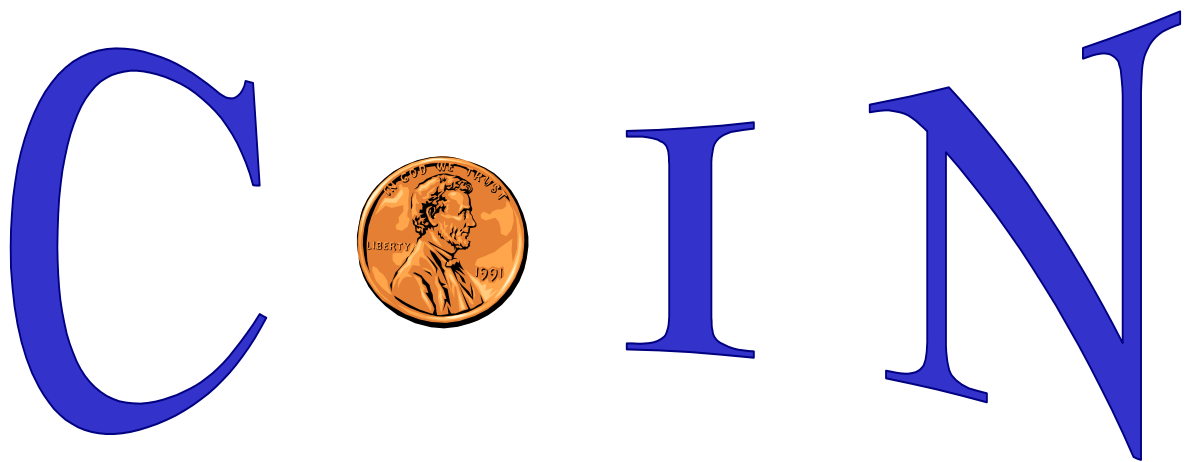


# Constitutional Officer Information Network



## *Budget Request Guide*

*Commissioners of the Revenue*

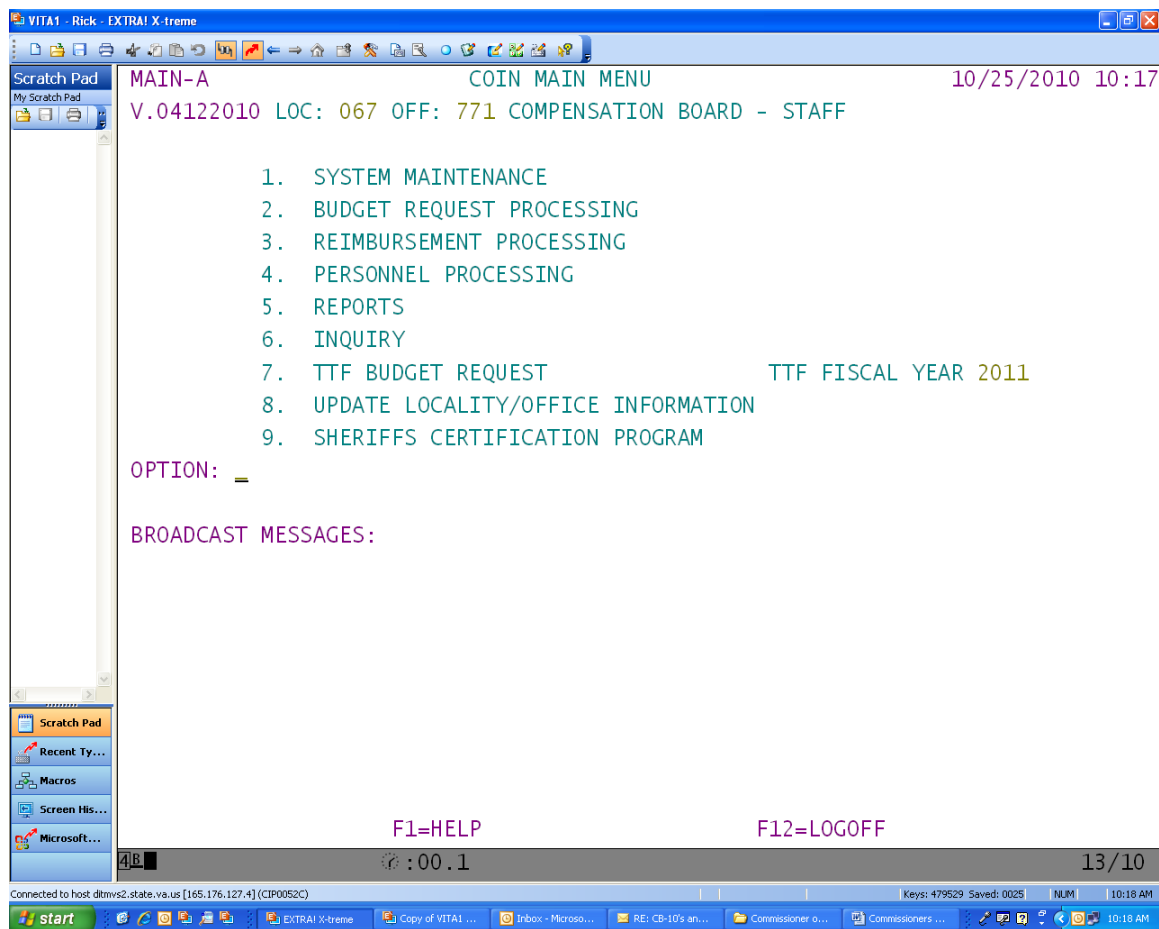
**Compensation Board**  
**December 1, 2021**

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## 1. COIN MAIN MENU



- Select Option #2 “Budget Request Processing”



## 2. Main Menu - Option #2, Budget Request (OLB) Menu

### Purpose:

The Budget Request menu is accessed from the COIN main menu. All Budget Request functionality will be accessed through this menu. A user may choose to view the Permanent Personnel data sorted by Last Name, or Position Number. The user may also select a starting value whereby the Permanent Personnel screen will display the record requested or the next record in the sort sequence if the requested record was not found.

### Navigational Path

- Coin Main Menu – Select Option #2, COIN Budget Request

### COMMISSIONERS OF THE REVENUE

### Helpful Hints:

- COIN Budget Request Menu provides access to other related screens
- Locality and office code will be displayed by COIN when you log into the COIN system
- 'FY' - The upcoming fiscal year will be pre-filled on your COIN Budget Request Menu
  - If you wish to view a prior fiscal year's Budget Request, type over the supplied fiscal year
- If the required fields have not been completed, the system will not allow you to certify your Budget Request

## Budget Request Menu

TSO-SNP - EXTRA! X-treme

MCB0 COIN BUDGET REQUEST 2009-10-26 10:54  
V.10272007 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY  
OFFICE: COMMISSIONER OF THE REVENUE OFFICER: EUBANK  
BUDGET REQUEST MENU

1. PERMANENT PERSONNEL SORTED BY  
    \_ LAST NAME OR STARTING LAST NAME: \_\_\_\_\_  
    \_ POSITION NUMBER OR STARTING POSITION NUMBER: \_\_\_\_\_  
ENTER "X" FOR SORT ORDER ONLY

2. ADDITIONAL EMPLOYEE REQUEST  
3. TEMPORARY PERSONNEL FUNDING REQUEST  
4. FULL OR PARTIALLY FUNDED PERSONNEL  
5. OFFICE EXPENSE FUNDING  
6. EQUIPMENT (EXCLUDING CLERKS)  
7. RECORD WORKLOAD INFORMATION

9. SPECIAL PROGRAM CERTIFICATION  
10. CERTIFY BUDGET REQUEST  
11. COMMENTS  
12. COMPENSATION BOARD FUNCTIONS

OPTION =

F1=HELP F3=MENU F4=TOTALS F12=MAIN

4B :00.8 22/09

### Helpful Hints (Continued):

- The 'Last Name' sort is the default sort option if no sort option is selected or no partial entry is found
  - ✓ The user may enter an 'X' in the 'Last Name' sort field to start at the 1<sup>st</sup> name listed alphabetically for your office, or
  - ✓ Tab to the 'Starting Last Name' field and input the Last Name of the employee you choose to start the sort
  - ✓ If a starting point or partial initial selection is selected but not found, the Permanent Personnel screen will be displayed starting at the next closest record
  - ✓ Only one sort order option or full/partial starting key may be chosen
- Screen selections #2 through #11 are accessed by entering the choice into the "Option" field in the lower left hand corner of the screen
  - ✓ Invalid option will result in an error message.

### Procedures:

- Select an 'Option' \_\_\_\_
  - ✓ If Option #1, Permanent Personnel, input 'X' next to the sort order you want to view
- 'F' Function Hot Keys allow back and forth movement between commonly used screens
- Press 'F3' or 'F12' to exit the screen to the COIN Main Menu

**CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE  
BUDGET REQUEST (OLB)**



### 3. Option #1, Permanent Personnel

**Purpose:**

The Permanent Personnel Request Screen is accessed from the COIN Budget Request menu. This screen allows the user to review and update the Permanent Personnel for the Budget Request. The user may update the Local Salary, Salary Amount Requested and Class Change. The Compensation Board (CB) may update Annual Salary, Salary Amount Requested and the Class fields. Totals for various fields may be accessed from this screen.

**Navigational Path:**

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #1, Permanent Personnel

**COMMISSIONERS OF THE REVENUE**

TSOSNP - EXTRA! X-treme

MCB1 COIN BUDGET REQUEST 2009-10-26 11:20  
V.01162009 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

PERMANENT PERSONNEL SORTED BY LAST NAME

CHG	POS	SSN	LAST NAME	FIRST NAME	ANNUAL APPROVED	LOCAL SALARY	SALARY SUPPL	AMT REQ ABOVE	SALARY REIMB	REIMB SAL AMT	CLASS	CLASS CHANGE
00007	000000000	VACANT			25587	26735	1148	0	25587	12793	DI	
					25587	26735	1148	0	25587	12793	DI	
00001	****6448	CREASY	JULIE		34022	36965	2943	0	34022	17010	MMT	
					34022	36965	2943	0	34022	17010	MMT	
00002	****4476	DELLIS	BETTY		37116	38694	1578	0	37116	18558	MDIII	
					37116	38694	1578	0	37116	18558	MDIII	
TOTAL												0008

BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED  
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F12=MAIN

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**Compensation Board**

Last Updated: 12/2/2021 @9:20 AM

## Option #1 Permanent Personnel

MCB1 COIN BUDGET REQUEST 2009-10-26 11:20  
V.01162009 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

PERMANENT PERSONNEL SORTED BY LAST NAME

CHG	POS	SSN	LAST NAME	FIRST NAME	SALARY	AMT REQ	SALARY	REIMB	CLASS	CLASS
		ANNUAL	LOCAL		SUPPL	ABOVE	AMT REQ	SAL AMT		CHANGE
		APPROVED	SALARY							
00007	000000000	VACANT								
		25587	26735		1148	0	25587	12793	DI	
		25587	26735		1148	0	25587	12793	DI	
00001	*****6448	CREASY		JULIE						
		34022	36965		2943	0	34022	17010	MMT	
		34022	36965		2943	0	34022	17010	MMT	
00002	*****4476	DELLIS		BETTY						
		37116	38694		1578	0	37116	18558	MDIII	
		37116	38694		1578	0	37116	18558	MDIII	
										TOTAL
										0008

BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED  
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F12=MAIN

01/01

### Helpful Hints:

- Option #1, Permanent Personnel screens display salaries for all CB funded employees
- This screen displays each position record for your office
  - If needed, multiple screens will be displayed to view all position records for your office
- If salary adjustments are made to the 'Salary Amount Requested', COIN will calculate the difference from the annual salary approved and place the difference in the amount requested above field
- Personnel changes (CB10s) processed during the time period that the online budget system is available to your office will automatically update personnel and salary data in COIN
  - The processing of a CB10 could eliminate any salary increase and/or change requests previously entered on this screen for the affected position if the officer has not yet signed off on the completed budget request
- The following codes may be listed in the 'CHG' data field
  - Blank Space = No CB10 action taken
  - 'C' = CB10 Change
- If the type of request entered for the affected position prior to the personnel change is still desired after the personnel change, the request must be re-entered on Permanent Personnel screen in Budget Request prior to sign off by the officer

### PROCEDURES:

**Annual Approved:** Supplied by CB (Can be changed by CB)

**Local Salary:** Enter the total salary for each position, including locality supplement if applicable. If no local supplement funded press Enter and CB Annual Approved Salary will be used.

**Salary Suppl:** Calculated for you = Total Locality amount minus the Compensation Board Approved Salary gives you the salary Supplement

**Amt Req Above:** Calculated for you = Salary Amount Requested – Annual Salary gives you amount requested above

**Sal Amt Req:** Entered by Officer or Compensation Board

**Reimb Sal Amt:** For 771, this will appear with the % amount reimbursed - i.e. the 50% amount for Deputies

**Class:** Supplied by system

**Class Change:** Enter the class you are making a request to change for a salary alignment for the employee currently in this position.  
(Do Not Enter A CB10 For This Request)

- After all requested data has been entered, press "Enter" to update and save information.
- Press 'F8' to proceed to the next page
- Press 'F3' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office



## 4. Option #2, Additional Personnel Request

### Purpose:

The Additional Personnel Request Screen is accessed from the COIN Budget Request menu. This screen will allow the User to Request Additional Personnel. The User may request additional personnel by Class type.

### Navigational Path:

- Coin Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu - Select Option #2, Additional Personnel Request

MCB2 COIN BUDGET REQUEST 2009-10-26 11:25  
V.02192007 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

ADDITIONAL PERSONNEL REQUEST

CLASS	ENTRY LEV	SAL	NUM OF POSITIONS	TOTAL AMT REQ
CT	19856	*	0	0
	19856		0	0
CTII	19856	*	0	0
	19856		0	0
DI	19856	*	0	0
	19856		0	0
GC	19856	*	0	0
	19856		0	0
SECI	19856	*	0	0
	19856		0	0
TEI	19856	*	0	0
	19856		0	0
				TOTAL 0006

BUDGET HAS BEEN SIGNED OFF YOU CANNOT MODIFY  
F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU

48 :00.5 09/25

### Helpful Hints:

- Complete this section to request additional full-time CB funded positions of a predefined class, or
- Complete this section to request additional full-time CB funded positions other than a predefined class
- Blank data fields (Class, Entry Level Salary and Number of positions) are provided to enter request for Additional Personnel other than pre-listed CB classes and/or salaries
- COIN calculates the total amount for each class based on the number of positions requested
- 'Number of Positions' fields **are required**, you must enter a '0' or the number of additional full-time CB funded positions requested
- Any new positions approved by the General Assembly or any reallocated positions will be allocated by the Compensation Board based upon the request and in accordance with the Compensation Board's staffing standards
- Valid Class must be entered; salary request must be between minimum and maximum of pay band of class requested

## Option #2 Additional Personnel Request

TSOSNIP - EXTRA! X-treme

MCB2 COIN BUDGET REQUEST 2009-10-26 11:25  
V.02192007 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

ADDITIONAL PERSONNEL REQUEST

CLASS	ENTRY LEV SAL	NUM OF POSITIONS	TOTAL AMT REQ
CT	19856 *	0	0
	19856	0	0
CTII	19856 *	0	0
	19856	0	0
DI	19856 *	0	0
	19856	0	0
GC	19856 *	0	0
	19856	0	0
SECI	19856 *	0	0
	19856	0	0
TEI	19856 *	0	0
	19856	0	0
			TOTAL 0006

BUDGET HAS BEEN SIGNED OFF YOU CANNOT MODIFY  
F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU

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### Procedures:

- Class:** Supplied by CB. If the supplied class is not the class you wish to add, tab to the blank field under the class column and input the class code you wish to request. Valid CB Class must be entered, if unknown, see the salary scale in the Appendix.
- Entry Level** Supplied by CB. If the supplied salary is not the salary you wish to request, tab to the blank field under the 'Entry Level' column and enter the salary you wish to request
- Number of Positions:** Enter the number of positions you are requesting
- Blank Fields (Other)** Enter Class, Salary and number of positions requested

- Press the "Enter" key after completing the information requested
- Press 'F8' to proceed to the next screen
- Press 'F3=Exit' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office



## 5. Option #3, Temporary Personnel Fund Request

### Purpose:

The Temporary Personnel Request Screen is accessed from the COIN Budget Request menu. The Temporary Personnel Request Screen allows the user to review or update the total dollar amount requested for the Temporary Personnel funding in the Budget request.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #3, Temporary Personnel Request

### COMMISSIONERS OF THE REVENUE

MCB3  
V.03072007 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY 2009-10-26 11:27

COIN BUDGET REQUEST

TEMPORARY PERSONNEL FUNDING REQUEST

BASE AMOUNT APPROVED	TOTAL REQUESTED	AMOUNT REQUESTED ABOVE/ BELOW
0	0	0
0	0	0

BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED

F1=HELP F3=MENU F4=TOTALS F9=FUNDING F12=MAIN

01/01

### Helpful Hints:

- The budgeted amount for the prior fiscal year for Temporary Employee funding is displayed in 'Base Amount Approved' column
- The 'Total Requested' data field should reflect your total request needed for Temporary Personnel funding
  - If no additional funds are needed above the 'Base Amount Approved', enter in the 'Base Amount Approved' as your total request for Temporary Personnel
  - If additional or reduced funding is reflected in the 'Total Request' data field, the 'Amount Requested Above/Below' will be recalculated
- Check the Base Amt Approved to your Original July 1 Approved Budget to make sure that fund transfers approved during the current year are not included in this figure, unless the approved Compensation Board minutes states that this a Base Budget Adjustment

### Option #3, Temporary Personnel Fund Request

TSOSNP - EXTRA! X-treme

MCB3 COIN BUDGET REQUEST 2009-10-26 11:27  
V.03072007 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

TEMPORARY PERSONNEL FUNDING REQUEST

BASE AMOUNT APPROVED	TOTAL REQUESTED	AMOUNT REQUESTED ABOVE/ BELOW
0	0	0
0	0	0

BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED  
F1=HELP F3=MENU F4=TOTALS F9=FUNDING F12=MAIN

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#### Procedures:

**Base Amt Approved:** Supplied by COIN  
**Total Req:** Enter your 'Total Request' for temporary funding  
**Amt Req Above/Below:** This field will be calculated for you

- Press the "Enter" key after completing the information requested
- Press 'F3' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office

**Purpose:**

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #4, Fully or Partially Funded Positions

[illegible]

MCBD		COIN BUDGET REQUEST				10/10/2019 14:37			
V.11232010 FY: 2020 LOC: 011 OFF: 771 APPOMATTOX COUNTY									
FULLY OR PARTIALLY FUNDED PERSONNEL							PAGE 001 OF 001		
(DOES NOT INCLUDE COMP BOARD PERMANENT PERSONNEL)									
DEL	LAST NAME	FIRST NAME	CLASS	HOURLY RATE	ANNL HOURS	TOTAL FUNDS	-FUND CB	LOC	SOURCE- FED OTH
-	GREEN	RACHEL	GC	011.15	2080	23192		X	
-	GELLER	ROSS	GC	011.15	2080	23192		X	
-							-	-	-
-							-	-	-
-							-	-	-
-							-	-	-
-							-	-	-
-							-	-	-
-							-	-	-
TOTAL FUNDS						46384			

F1=HELP

F3=EXIT

F4=TOTALS

F5=FIRST

F6=LST

F7=PREV

F8=NEXT

F12=MAIN

### Option #4, Fully or Partially Funded Positions

### Helpful Hints:

- This screen should be used to enter salary information of positions fully or partially funded by the Compensation Board, the Locality or other sources
- This **does not** include positions identified as current permanent employees under Option #1, which may be supplemented by another source
- Upon entry of the required fields, the system will calculate the fund amount for each person and the total funds for your office
- For each temporary employee for whom reimbursement will be requested from CB approved temporary personnel funding, last name, first name, class, hourly rate, planned number of hours to be reimbursed for the fiscal year and the source(s) of funding for the personnel must be provided
  - If employee is unknown, key 'Vacant' in the 'Last Name' data field
  - Annual hours cannot exceed 2,080 per individual
  - Enter "X" in at least one fund source field
  - 'X' may be entered in as many of the fund source fields as are applicable for that record

## Option #4, Fully or Partially Funded Positions

MCBD COIN BUDGET REQUEST 10/10/2019 14:37  
V.11232010 FY: 2020 LOC: 011 OFF: 771 APPOMATTOX COUNTY

FULLY OR PARTIALLY FUNDED PERSONNEL									
(DOES NOT INCLUDE COMP BOARD PERMANENT PERSONNEL)									
DEL	LAST NAME	FIRST NAME	CLASS	HOURLY RATE	ANNUAL HOURS	TOTAL FUNDS	-FUND CB	LOC	SOURCE-FED OTH
-	GREEN	RACHEL	GC	011.15	2080	23192		X	
-	GELLER	ROSS	GC	011.15	2080	23192		X	
-							-	-	-
-							-	-	-
-							-	-	-
-							-	-	-
-							-	-	-
-							-	-	-
-							-	-	-
-							-	-	-
TOTAL FUNDS						46384			

F1=HELP F3=EXIT F4=TOTALS F5=FIRST F6=LST F7=PREV F8=NEXT F12=MAIN

### Procedures:

<b>Del:</b>	Enter 'D' to delete entry
<b>Last Name:</b>	Enter the employee's last name; if vacant, type "Vacant"
<b>First Name:</b>	Enter the employee's first name if known; if 'vacant' this data field may be left blank because the system will look for 'Vacant' in the 'Last Name' data field
<b>Class:</b>	Enter the employee's class (Does not have to be a CB classification)
<b>Hourly Rate:</b>	Enter the employee's hourly wage rate
<b>Annl Hours:</b>	Enter the total number of hours worked <u>annually</u>
<b>Tot Funds:</b>	This field will be calculated for you
<b>CB:</b>	Enter "X", if employee is partially or fully funded by the CB from temporary personnel funds
<b>Loc:</b>	Enter "X", if employee is partially or fully funded by the Locality
<b>Fed:</b>	Enter "X", if employee is partially or fully federally funded
<b>Other:</b>	Enter "X", if employee is partially or fully funded by other sources

- Press the "Enter" key after completing the information requested
- Press 'F8' for next blank page when applicable
- Press 'F3' to exit the screen to the Budget Request Menu

## 7. Option #5, Office Expense Funding Request

### Purpose:

The Office Expense Funding Request screen is accessed from the COIN Budget Request menu. The Office Expense screen allows the user to review or update the total dollar amount requested for the Office Expense Budget request.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #5, Office Expense Funding Request

COMMISSIONERS OF THE REVENUE			
<div style="display: flex; justify-content: space-between; font-family: monospace;"> <span>MCB5</span> <span>COIN BUDGET REQUEST</span> <span>10/26/2009 11:35</span> </div> <div style="display: flex; justify-content: space-between; font-family: monospace;"> <span>V.11052008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY</span> </div>			
OFFICE EXPENSE FUNDING REQUEST			
STATIONARY, OFFICE SUPPLIES, PRINTING (FORMS AND LETTERS) POSTAGE/BOX RENTAL, TELEPHONE (TAX EXCLUDED), REPAIRS TO OFFICE FURNITURE AND EQUIPMENT OTHER NECESSARY EXPENSES INCLUDING ASSOCIATION DUES			
	BASE AMT APPROV	TOTAL REQ	AMT REQ ABOVE/ BELOW
OFFICER AMTS CB AMTS			
UPDATE NOT ALLOWED WHEN APPROVED BY COMP BOARD <span style="color: red;">F1=HELP</span> <span style="color: red;">F3=EXIT</span> <span style="color: red;">F4=TOTALS</span> <span style="color: red;">F12=MAIN</span>			
48 :00.5		01/01	

### Helpful Hints:

- The total office expenses for the prior year will be displayed as your 'Base Amount Approved'
- This screen allows you to request an increase or decrease to your office expense funding or retain the same amount in the "Total Request" field
- COIN will recalculate the 'Amount Requested Above/Below' based on the 'Total Request' entered
- Participation of the Compensation Board in Office Expenses is limited to certain items as provided by the Code of Virginia (1950), as amended
  - ✓ Any additions or transfers made during the current fiscal year may be included in the supplied figures
  - ✓ Check the supplied amount to the original Compensation Board approved Budget, or approved minutes for changes affecting the base budget.



## Option #5, Office Expense Funding

TSOSNIP - EXTRA! X-frame

MCB5 COIN BUDGET REQUEST 10/26/2009 11:35  
 V.11052008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

OFFICE EXPENSE FUNDING REQUEST

STATIONARY, OFFICE SUPPLIES, PRINTING (FORMS AND LETTERS)  
 POSTAGE/BOX RENTAL, TELEPHONE (TAX EXCLUDED),  
 REPAIRS TO OFFICE FURNITURE AND EQUIPMENT  
 OTHER NECESSARY EXPENSES INCLUDING ASSOCIATION DUES

BASE AMT APPROV	TOTAL REQ	AMT REQ ABOVE/ BELOW
OFFICER AMTS		
CB AMTS		

UPDATE NOT ALLOWED WHEN APPROVED BY COMP BOARD

F1=HELP F3=EXIT F4=TOTALS F12=MAIN

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### Procedures:

- Press the "TAB" key to go to the next field of entry

<b>Base Amt Approved:</b>	Supplied by COIN
<b>Total Request:</b>	Enter your 'Total Request' for office expense funding
<b>Amt Req Above/Below:</b>	This field will be calculated for you

- Press the "Enter" key after completing the information requested
- Press 'F3' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office

# CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE BUDGET REQUEST (OLB)



## 8. Option #6, Equipment

### Purpose:

The Equipment Request Screen is accessed from the COIN Budget Request menu. Requests for Equipment are made by Category and costs are calculated by quantity.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #6, Equipment

TSOSHIP - EXTRA! X-treme

MCB4 COIN BUDGET REQUEST 10/26/2009 11:37  
V.04162008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

EQUIPMENT REQUEST

SEL CATEGORY: A INFO TECHNOLOGY

NEW UNIT	NEW COST	NEW QTY	NEW TOT COST	RPL UNIT	RPL COST	RPL QTY	RPL TOT COST	TOT QTY	TOTAL COST	STRESSED COST
DESC: COMPUTER										
			1500	2		3000	2	3000	3,000.00	
DESC: MONITOR										
			1000	2		2000	2	2000	2,000.00	
DESC:										

UPDATE NOT ALLOWED WHEN APPROVED BY COMP BOARD  
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN

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start Microsoft Office Word Microsoft Office PowerPoint TSOSHIP - EXTRA! X-treme Microsoft Excel - Final...

### Helpful Hints:

- The system will calculate the total amount for each equipment item requested and the total amount for all items for your office
- These screens allow the user to request Information Technology (IT) equipment items along with the unit cost and quantity
- NOTE: The Compensation Board may require justification for these items upon review of your budget request.

## Option #6 Equipment

TSOSNP - EXTRA X-frame

MCB4 COIN BUDGET REQUEST 10/26/2009 11:40  
V.04162008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

EQUIPMENT REQUEST

SEL CATEGORY: B OFFICE EQUIPMNT

NEW UNIT	NEW COST	NEW QTY	TOT COST	RPL UNIT	RPL COST	RPL QTY	TOT COST	TOTAL COST	STRESSED COST
DESC: _									
DESC:									
DESC:									

UPDATE NOT ALLOWED WHEN CERTIFIED BY OFFICER  
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN

4B :00.4 11/09

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start Microsoft Office 2003 Commissioners FY11 TSOSNP - EXTRA X-frame Microsoft Excel - Final...

Keys: 269234 Saved: 0023 NUM 11:41 AM

### Procedures:

- User will select and input the equipment category they wish to request
    - ✓ Category 'A', IT Equipment
    - ✓ Category 'B', Office Equipment
    - ✓ Category 'C', Furniture
  - To proceed to your next equipment category, enter in your next 'SEL CATEGORY'
- Desc:** List requested equipment or utilize the 'F1' help function
- New Unit Cost:** Enter unit cost of the new equipment requested
- New Qty:** Enter the quantity here, if this is new equipment not presently owned
- New Total Cost:** Calculated
- RPL Unit Cost:** Enter unit cost of the replacement equipment requested
- RPL Qty:** Enter the quantity here, if this is Replacement equipment for existing equipment being replaced
- RPL Total Cost:** Calculated
- Total Qty:** Calculated (New + Replacement)
- Total Cost:** Calculated (New + Replacement)
- Stressed Cost:** Calculated (See Operating Manual)
- Press the "Enter" key after all information has been entered
  - Press 'F8= Next' key to proceed to the next screen if additional screens are needed for your equipment request
  - Press 'F3 = Exit' to exit the screen to the Budget Request Menu
  - Press 'F4' to display "Totals" for your office

## Option #6, Equipment

### COMMISSONERS OF THE REVENUE

#### Category A – Information Technology (It) Equipment

MCB4 COIN BUDGET REQUEST 10/26/2009 11:43  
V.04162008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

EQUIPMENT REQUEST

SEL CATEGORY: A INFO TECHNOLOGY

NEW UNIT	NEW COST	NEW QTY	RPL UNIT	RPL COST	RPL QTY	TOT QTY	TOTAL COST	STRESSED COST
DESC: COMPUTER			1500		2	3000	3000	3,000.00
DESC: MONITOR			1000		2	2000	2000	2,000.00

UPDATE NOT ALLOWED WHEN CERTIFIED BY OFFICER  
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN

4:00.1 11/09

#### Help Pop-Up Screens - Within Alpha Data Fields (Resqportal Only)

- Utilize 'F1= Help' in any blank data field if you need help with a COIN data field
- Utilize 'F3 =Exit' to close the help window
- Utilize 'F7 = Previous' to move to the previous screen
- Utilize 'F8= Next' to move to other listed equipment categories
- Utilize 'F17 = Substitute Value' ('Shift + F5'), to replace a blank field with a selected value within the help screen. Using your arrow keys, place the cursor under the 1<sup>st</sup> position of your selection and press F17.

MCB4 COIN BUDGET REQUEST 12/19/2006 11:03  
V.10262006 FY: 2008 LOC: 013 OFF: 734 ARLINGTON COUNTY

EQUIPMENT REQUEST

SEL CATEGORY: A INFO TECHNOLOGY

NEW UNIT	NEW COST	NEW QTY	RPL UNIT	RPL COST	RPL QTY	TOT QTY	TOTAL COST	STRESSED COST
DESC: _____								

COIN HELP Facility

EQUIPMENT ITEM.

This list contains the most common items requested for a specific equipment category.

\*\*To return a specific item to the equipment request screen you can place the cursor on the desired item

F3=Close Win F7=Prev Help F8=Next Help

F1=HLP (More) RV F8=NXT F10=ITEM F12=MAIN

4:00.5 11/09

## Option #6, Equipment

### COMMISSONERS OF THE REVENUE

#### Category B – Office Equipment

TSOSNP - EXTRA X-frame

MCB4 COIN BUDGET REQUEST 10/26/2009 11:40  
V.04162008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

EQUIPMENT REQUEST

SEL CATEGORY: B OFFICE EQUIPMNT

NEW UNIT	NEW COST	NEW QTY	NEW TOT	RPL UNIT	RPL COST	RPL QTY	RPL TOT	TOT QTY	TOTAL COST	STRESSED COST
DESC: _										
DESC:										
DESC:										

UPDATE NOT ALLOWED WHEN CERTIFIED BY OFFICER  
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN

4B :00.4 11/09

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start Microsoft Office O... Commissioners FY11... TSOSNP - EXTRA X... Microsoft Excel - Final...

Keys: 289234 Saved: 0023 NUM 11:43 AM

#### Category C – Furniture Equipment

TSOSNP - EXTRA X-frame

MCB4 COIN BUDGET REQUEST 10/26/2009 11:42  
V.04162008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

EQUIPMENT REQUEST

SEL CATEGORY: C FURNITURE

NEW UNIT	NEW COST	NEW QTY	NEW TOT	RPL UNIT	RPL COST	RPL QTY	RPL TOT	TOT QTY	TOTAL COST	STRESSED COST
DESC: _										
DESC:										
DESC:										

UPDATE NOT ALLOWED WHEN CERTIFIED BY OFFICER  
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN

4B :00.1 11/09

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start Microsoft Office O... Commissioners FY11... TSOSNP - EXTRA X... Microsoft Excel - Final...

Keys: 289238 Saved: 0023 NUM 11:43 AM



## 9. Option #7, Record Workload Information

### Purpose:

The Record Workload Information menu is accessed from the Budget Request menu. Users can select the frequency for recording workload information.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #7, Record Workload Information

### COMMISSIONERS OF THE REVENUE

MCB6 COIN BUDGET REQUEST 10/26/2009 11:45  
V.11052008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION

SELECT RECORDING FREQUENCY OF WORKLOAD INFORMATION:

1. MONTHLY  
2. QUARTERLY  
3. ANNUALLY

CALENDAR YEAR: 2008

OPTION: =

F1=HELP F3=MENU F4=TOTALS F12=MAIN

4B :00.2 22/10

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- Offices must record one full year of workload data for the most recent completed Calendar Year
- Provide requested information in accordance with Section 15.2-1636.7, Code of Virginia. Information requested is based **on the most recent calendar year**
- Select 'Option #3' and press the "Enter" key to proceed to the next screen
- The Workload Measures screens must be processed and an amount must be entered for each workload measure for the most recent ending calendar year
  - ✓ The screens will also display the amounts for the previous two calendar years
  - ✓ Enter the number of transactions for each workload measure listed; if not applicable, to your office enter '0', and "TAB" to the next field
  - ✓ **Do Not Leave Blanks** or the system will generate an error message.
- Press 'F3=Exit' to exit the screen to the Budget Request Menu
- 'F12=Main' returns you to the COIN Main Menu

The following pages display the individual Workload Measures by program that must be completed:

## Option #7, Record Workload Information

### Option #3 Annual Screens

Screen 1 of 6

MCBH-F COIN BUDGET REQUEST 10/26/2009 11:47  
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY	2007	2008	2009	AVG
ADJUSTMENTS:				
1.A. TAX ASSESSMENTS ADJUSTED	0	728		364
1.B. BUSINESS LICENSE ASSESSMENTS ADJ	0	0		0
1.C. PERSONAL PROPERTY ASSESSMENTS ADJ	8926	8817		8872
1.D. BUSINESS PERS PROP ASSESSMENTS ADJ	0	0		0
1.E. MERCHANT'S CAPITAL ASSESSMENTS ADJ	0	0		0
1.F. MACHINERY & TOOLS ASSESSMENTS ADJ	0	0		0
1.G. EXCISE TAX ASSESSMENTS ADJUSTED	0	0		0
1.H. PERSONAL PROPERTY LICENSE FEES ADJUSTE	0	0		0
AUDITS & APPEALS:				
2. TAX RELIEF APPLICATIONS	461	395		428
3. BUSINESS LICENSE DESK AUDITS	0	0		0
4. BUSINESS LICENSE FIELD AUDITS	0	0		0
5. PERSONAL PROPERTY DESK AUDITS	10000	1000		5500
6. PERSONAL PROPERTY FIELD AUDITS	0	0		0
7. MERCHANT'S CAPITAL DESK AUDITS	300	25		163

F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN 08/63

#### Adjustments

**Definition:** An adjustment is the act of processing an increase or decrease in the original assessed amount.

- A. NUMBER OF REAL ESTATE TAX ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by proration or audits and may include the application of tax relief, tax credits, or land use programs.

**B. NUMBER OF BUSINESS LICENSE ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any increase or decrease in the original license fee based on discovery of gross receipts; or in the case of wholesalers, gross purchases. Adjustments may be made after discovery of new receipts, i.e. Schedule C; audits, which require additional information to be provided by the entity; and self-reporting errors.

**C. NUMBER OF PERSONAL PROPERTY ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by proration or audits. This does not include adjustments that were made to the personal property records prior to generation of the final Personal Property Book.

**D. NUMBER OF BUSINESS PERSONAL PROPERTY ASSESSMENTS ADJUSTED:** : Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. An audit must include the requisition of additional information from the business that results in discovery of new property or an error in the original reporting.

**E. NUMBER OF MERCHANT'S CAPITAL ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. An audit must include the requisition of additional information from the business that results in discovery of new capital or an error in the original reporting.

**F. NUMBER OF MACHINERY & TOOLS ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. An audit must include the requisition of additional information from the business that results in discovery of new machinery and tools or an error in the original reporting.

**G. NUMBER OF EXCISE TAX ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. This should include audits that apply to meals, lodging, admissions, short term rental, cigarettes and any other local excise taxes assessed.

**H. NUMBER OF LICENSE FEES ADJUSTED:** Enter the of license fees adjusted by your office as a result of proration or disposal of a vehicle.

#### Audits & Appeals

**Definition:** Auditing is a systematic process of objectively obtaining and evaluating evidence regarding assertions about economic actions and events to ascertain the degree of correspondence between the assertions and established criteria. For purpose of the following section, the COR or

**Deputy must summons additional information in writing and compare the new information to that which was originally reported.**

2. **NUMBER OF APPLICATIONS RECEIVED FOR TAX RELIEF, REAL ESTATE, PERSONAL PROPERTY, DISABLED, ETC.:** Enter the total of the applications received in your office annually. **Do not multiply this figure by any factor if you prorate or bill more than once a year. Do not duplicate any numbers included in adjustments under section 1.**
3. **NUMBER OF BUSINESS LICENSE DESK AUDITS:** Enter the total number of desk audits completed on business license accounts annually. **A desk audit must follow the above stated definition. This does not include regular processing of license applications and renewals. Enter the number of new taxpayers identified through discovery i.e. Schedule C, annually.**

MCBH-F COIN BUDGET REQUEST 10/26/2009 11:47  
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY	2007	2008	2009	AVG
<b>ADJUSTMENTS:</b>				
1.A. TAX ASSESSMENTS ADJUSTED	0	728		364
1.B. BUSINESS LICENSE ASSESSMENTS ADJ	0	0		0
1.C. PERSONAL PROPERTY ASSESSMENTS ADJ	8926	8817		8872
1.D. BUSINESS PERS PROP ASSESSMENTS ADJ	0	0		0
1.E. MERCHANT'S CAPITAL ASSESSMENTS ADJ	0	0		0
1.F. MACHINERY & TOOLS ASSESSMENTS ADJ	0	0		0
1.G. EXCISE TAX ASSESSMENTS ADJUSTED	0	0		0
1.H. PERSONAL PROPERTY LICENSE FEES ADJUST	0	0		0
<b>AUDITS &amp; APPEALS:</b>				
2. TAX RELIEF APPLICATIONS	461	395		428
3. BUSINESS LICENSE DESK AUDITS	0	0		0
4. BUSINESS LICENSE FIELD AUDITS	0	0		0
5. PERSONAL PROPERTY DESK AUDITS	10000	1000		5500
6. PERSONAL PROPERTY FIELD AUDITS	0	0		0
7. MERCHANT'S CAPITAL DESK AUDITS	300	25		163

F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN  
:00.1 08/63

4. **NUMBER OF BUSINESS LICENSE FIELD AUDITS:** Enter the total number of field audits completed on business license accounts annually. **A field audit requires a visit to the physical location of the business. Enter the number of new taxpayers identified through field discovery annually.**
5. **NUMBER OF PERSONAL PROPERTY DESK AUDITS:** Enter the total number of desk audits completed on personal property accounts annually. **A desk audit must follow the above stated definition. Enter the number of new taxpayers identified through discovery annually. Do not include motor vehicle record adds or deletes transferred from DMV.**
6. **NUMBER OF PERSONAL PROPERTY FIELD AUDITS:** Enter the total number of field audits completed on personal property accounts annually. **A field audit requires a visit to the physical location of the property. Enter the number of new taxpayers identified through field discovery annually.**
7. **NUMBER OF MERCHANT'S CAPITAL DESK AUDITS:** Enter the total number of desk audits completed on merchant's capital accounts annually. **A desk audit must follow the above stated definition. Enter the number of new taxpayers identified through discovery annually.**



## Option #7, Record Workload Information Option #3 Annual Screens

Screen 2 of 6

MCBH-F		COIN BUDGET REQUEST		10/26/2009 11:49	
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY					
RECORD WORKLOAD INFORMATION - ANNUALLY					
CALENDAR YEAR	2007	2008	2009	AVG	
8. MERCHANT'S CAPITAL FIELD AUDITS	0	0		0	
9. BUSINESS PERSONAL PROPERTY DESK AUDITS	3500	1000		2250	
10. BUSINESS PERSONAL PROPERTY FIELD AUDITS	225	200		213	
11. MACHINERY & TOOLS DESK AUDITS	60	10		35	
12. MACHINERY & TOOLS FIELD AUDITS	0	0		0	
13. EXCISE TAX DESK AUDITS	25	50		38	
14. EXCISE TAX FIELD AUDITS	0	0		0	
15. LOCAL BUSINESS LICENSE APPEALS	0	0		0	
16. STATE BUSINESS LICENSE APPEALS	0	0		0	
17. LOCAL MERCHANT'S CAPITAL APPEALS	0	0		0	
18. MERCHANT'S CAPITAL STATE APPEALS	0	0		0	
19. LOCAL BUSINESS PERSONAL PROPERTY APPEALS	120	50		85	
20. STATE BUSINESS PERSONAL PROPERTY APPEALS	0	0		0	
21. LOCAL MACHINERY & TOOLS APPEALS	0	0		0	
22. STATE MACHINERY & TOOLS APPEALS	0	0		0	
23. LOCAL EXCISE TAX APPEALS	0	0		0	
I0048 RECORD UPDATED SUCCESSFULLY					
F1=HELP		F3=MENU		F7=PRV	
				F8=NXT	
				F12=MAIN	
48	:00.2		07/63		

8. **NUMBER OF MERCHANT'S CAPITAL FIELD AUDITS:** Enter the total number of field audits completed on merchant's capital accounts annually. **A field audit requires a visit to the physical location of the business.** Enter the number of new taxpayers identified through field discovery annually.
9. **NUMBER OF BUSINESS PERSONAL PROPERTY DESK AUDITS:** Enter the total number of desk audits completed on business personal property annually. **A desk audit must follow the above stated definition.** Enter the number of new taxpayers identified through discovery annually.
10. **NUMBER OF BUSINESS PERSONAL PROPERTY FIELD AUDITS:** Enter the total number of field audits completed on business personal property annually. **A field audit requires a visit to the physical location of the property.** Enter the number of new taxpayers identified through discovery annually.
11. **NUMBER OF MACHINERY & TOOLS DESK AUDITS:** Enter the total number of desk audits completed on machinery & tools annually. **A desk audit must follow the above stated definition.** Enter the number of new taxpayers identified through discovery annually.
12. **NUMBER OF MACHINERY & TOOLS FIELD AUDITS:** Enter the total number of field audits completed on machinery & tools annually. **A field audit requires a visit to the physical location of the business.** Enter the number of new taxpayers identified through field discovery annually.
13. **NUMBER OF EXCISE TAX DESK AUDITS:** Enter the total number of desk audits completed on excise tax accounts annually. **A desk audit must follow the above stated definition.** Enter the number of new taxpayers identified through discovery annually.
14. **NUMBER OF EXCISE FIELD AUDITS:** Enter the total number of field audits completed on excise tax accounts annually. **A field audit requires a visit to the physical location of the business.** Enter the number of new taxpayers identified through field discovery annually.
15. **NUMBER OF LOCAL BUSINESS LICENSE APPEALS:** Enter the total number of written tax appeals filed locally for business license tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
16. **NUMBER OF STATE BUSINESS LICENSE APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for business license tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
17. **NUMBER OF LOCAL MERCHANT'S CAPITAL APPEALS:** Enter the total number of written tax appeals filed locally for merchant's capital tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
18. **NUMBER OF MERCHANT'S CAPITAL STATE APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for merchant's capital tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
19. **NUMBER OF LOCAL BUSINESS PERSONAL PROPERTY APPEALS:** Enter the total number of written tax appeals filed locally or business personal property tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).

20. **NUMBER OF STATE BUSINESS PERSONAL PROPERTY APPEALS:** *Enter the total number of written tax appeals filed with the State Tax Commissioner for business personal property tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).*
21. **NUMBER OF LOCAL MACHINERY & TOOLS APPEALS:** *Enter the total number of written tax appeals filed locally for machinery & tools tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).*
22. **NUMBER OF STATE MACHINERY & TOOLS APPEALS:** *Enter the total number of written tax appeals filed with the State Tax Commissioner for machinery & tools tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).*
23. **NUMBER OF LOCAL EXCISE TAX APPEALS:** *Enter the total number of written tax appeals filed locally for excise tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).*

## Option #7, Record Workload Information Option #3 Annual Screens

### Screen 3 of 6

MCBH-F COIN BUDGET REQUEST 10/26/2009 11:50  
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION	- ANNUALLY		
CALENDAR YEAR	2007	2008	2009
24. STATE EXCISE TAX APPEALS	0	0	0
25. LOCAL REAL ESTATE TAX APPEALS	400	150	275
26. STATE REAL ESTATE TAX APPEALS	0	0	0
BUSINESS LICENSES, MERCHANTS CAPITAL&EXCISE:			
27. BUSINESS LIC/CAPITAL ACCTS	594	581	588
28. LAND USE TAX/ROLLBACK APPL	5900	5900	5900
29. EXCISE TAXES/BUSINESS ASSESSED	179	221	200
30.A. FINANCIAL INSTITUTIONS IN YOUR LOC	0	10	5
30.B. FINANCIAL INST/BANK FRANCHISE TAX	4	1	3
31. COAL/GAS, OIL, MINERAL TAX ACCOUNTS	4	4	4
GENERAL ADMINISTRATIVE & LEGAL:			
32. GENERAL ADMINISTRATIVE DUTIES	0	250	125
33. SUMMONS	5	0	3
34. CRIMINAL FAILURE TO FILE COMPLAINTS	0	0	0
35. WORKMAN'S COMPENSATION AFFIDAVITS	0	0	0
36. PILOT PROGRAMS	0	0	0
I0048 RECORD UPDATED SUCCESSFULLY			
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN			

07/63

24. **NUMBER OF STATE EXCISE TAX APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for excise tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
25. **NUMBER OF REAL ESTATE TAX APPEALS:** Enter the total number of written tax appeals filed locally for real estate tax (see Va. Code § 58.1- 3350, 58.1-3351 & 58.1-3380).
26. **NUMBER OF REAL ESTATE TAX APPEALS:** Enter the total number of written tax appeals filed with the Circuit Court for real estate tax (see Va. Code § 58.1- 3382).

### Business Licenses, Merchants Capital & Excise

27. **NUMBER OF BUSINESS LICENSES ISSUED AND MERCHANTS CAPITAL ACCOUNTS:** Enter the total number of all business licenses processed annually. **Do not multiply this number by any factor if you bill multiple times per year.** For those localities with merchant's capital, report the total number of accounts.
28. **NUMBER OF APPLICATIONS PROCESSED FOR LAND USE TAXATION AND ROLLBACK ASSESSMENTS:** Enter the total number of land use and rollback applications processed. **This may be moved to the real estate section in future years.**
29. **NUMBER OF BUSINESS ACCOUNTS ASSESSED FOR EXCISE TAXES:** Enter the total number of business accounts. This should include meals, lodging, admissions, short term rental, right-of-way, 911, utility tax, consumption tax (including telephone and mobile phone tax), cigarettes and any other local excise taxes assessed. **Do not** multiply this number by the number of processing's during a year, i.e., **Do not** multiply by twelve for monthly processing or by four for quarterly processing's.
30. **A. NUMBER OF FINANCIAL INSTITUTIONS IN YOUR LOCALITY.** Enter the total number of financial institutions that are in your locality.  
**B. NUMBER OF FINANCIAL INSTITUTIONS WITH THEIR MAIN OFFICE IN YOUR LOCALITY THAT ARE REQUIRED TO FILE THE BANK FRANCHISE TAX WITH YOUR OFFICE:** Enter the total number of banks that file returns with your office that can be verified with the Department of Taxation.
31. **NUMBER OF COAL/GAS SEVERANCE TAX, COAL ROAD TAX, OIL SEVERANCE TAX AND MINERAL TAX ACCOUNTS:** If your office handles these functions, enter the number of Coal/Gas Severance, Coal Road, Oil Severance and mineral taxes accounts. **Do not** multiply this figure by any factor if billed more than once a year.

# CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE

TSOSMB - EXTRA X-frame

MCBH-F COIN BUDGET REQUEST 10/26/2009 11:50  
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY	2007	2008	2009	AVG
24. STATE EXCISE TAX APPEALS	0	0		0
25. LOCAL REAL ESTATE TAX APPEALS	400	150		275
26. STATE REAL ESTATE TAX APPEALS	0	0		0
BUSINESS LICENSES, MERCHANTS CAPITAL&EXCISE:				
27. BUSINESS LIC/CAPITAL ACCTS	594	581		588
28. LAND USE TAX/ROLLBACK APPL	5900	5900		5900
29. EXCISE TAXES/BUSINESS ASSESSED	179	221		200
30.A. FINANCIAL INSTITUTIONS IN YOUR LOC	0	10		5
30.B. FINANCIAL INST/BANK FRANCHISE TAX	4	1		3
31. COAL/GAS, OIL, MINERAL TAX ACCOUNTS	4	4		4
GENERAL ADMINISTRATIVE & LEGAL:				
32. GENERAL ADMINISTRATIVE DUTIES	0	250		125
33. SUMMONS	5	0		3
34. CRIMINAL FAILURE TO FILE COMPLAINTS	0	0		0
35. WORKMAN'S COMPENSATION AFFIDAVITS	0	0		0
36. PILOT PROGRAMS	0	0		0

I0048 RECORD UPDATED SUCCESSFULLY  
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN

418 :00.1 07/63

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start Microsoft Office G... Commissioners FY11... TSOSMB - EXTRA X-frame... Microsoft Excel - Final... Keys: 289263 Saved: 0028 N/A 11:51 AM

## General Administrative & Legal

32. **GENERAL ADMINISTRATIVE DUTIES:** Enter the total number of opinions rendered and tax accounts reviewed (i.e. following review the Code of Virginia, AG's Opinion's, DOT Guidelines). **Do Not** include formal appeals (see Number of Appeals); Enter number annual surveys completed, general information requests (including FOIA requests). Enter number of personnel reviews conducted. Enter the total number of "Sales Tax Ads & Deletes" reviewed. **Do Not** add new businesses or merchants capital. (See current workload measure #8 Number of Business Licenses Issued and Merchants Capital Accounts.) **Enter number of requests by stakeholders, such as business listings, realtor listings, new business listings, etc. Do not include requests for directions, office hours, and the like.**
33. **NUMBER OF SUMMONS:** Enter the total number of summons issued annually (see Va. Code § 58.1-3110.)
34. **NUMBER OF CRIMINAL FAILURE TO FILE COMPLAINTS:** Enter the total number of criminal failure to file complaints issued annually (see § 58.13916.1).
35. **NUMBER OF WORKMAN'S COMPENSATION AFFIDAVITS:** Enter the total number of Workmen's Compensation Affidavits processed annually.
36. **NUMBER OF PILOT PROGRAMS:** Enter the total number of State sponsored "pilot" programs in which you are participating.

## Option #7, Record Workload Information Option #3 Annual Screens

Screen 4 of 6

MCBH-F		COIN BUDGET REQUEST		10/26/2009 11:51	
V.03302009 FY: 2011 LOC: 019		OFF: 771 BEDFORD COUNTY			
RECORD WORKLOAD INFORMATION - ANNUALLY					
CALENDAR YEAR	2007	2008	2009	AVG	
INCOME TAX:					
37. STATE TAX RETURNS PROCESSED	9085	9261		9173	
38. ESTIMATED STATE TAX ASSESSMENTS	1593	1655		1624	
39. TAXPAYERS ASSISTED WITH STATE INCOME TAX	1000	1000		1000	
40. STATE TAX RETURNS PREPARED	40	200		120	
PERSONAL PROPERTY AND MACHINERY & TOOLS:					
41. PERSONAL PROPERTY ASSESSEMENTS	123489	120838		122164	
42. PERSONAL PROPERTY REGISTRATION RENEWALS	59165	59244		59205	
43. PERSONAL PROPERTY NEW REGISTRATIONS	26510	23917		25214	
44. PERSONAL PROPERTY REGISTRATION DELETIONS	25254	19222		22238	
45. PERSONAL PROPERTY PRORATION ASSESSMENTS	51640	43078		47359	
46.A. PPTRA COMPLIANCE	85852	82830		84341	
46.B. PERS PROP TAX ACCTS FOR PPTRA COMPLIN	3700	3500		3600	
47. PERS PROP VEHICLES R/FOR DMV PPTRA DUPL	0			0	
48. MOTOR VEHICLE RECORDS REV FOR PPTVR QUAL		0		0	
49. ISSUANCE OF NO FEE MOTOR VEH DECALS	0	0		0	
I0048 RECORD UPDATED SUCCESSFULLY					
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN					
08/63					

### Income Tax

37. **NUMBER OF STATE INCOME TAX RETURNS PROCESSED BY YOUR OFFICE:** Enter the total number that can be verified by the Department of Taxation. **Do not** include tax returns prepared by your office. They will be counted under item #40 in the proposed new workload definitions.
38. **NUMBER OF STATE TAX ASSESSMENTS FOR ANNUAL ESTIMATED INCOME TAXPAYERS:** Enter the total number that can be verified by the Department of Taxation.
39. **NUMBER OF TAXPAYERS ASSISTED WITH STATE INCOME TAX:** Enter the total number of taxpayers assisted with State Income Tax related questions. Include telephone and walk-in inquiries that can be verified by a daily log.
40. **NUMBER OF STATE TAX RETURNS PREPARED:** Enter the total number of tax returns your office actually prepared for taxpayers. Do not include returns processed (this is counted in Old Definition #37) **Include all ifile returns.**

### Personal Property & Machinery and Tools

41. **NUMBER OF PERSONAL PROPERTY ASSESSMENTS:** Enter the total number of items of the following kinds of personal property assessments in your jurisdiction: count each separate motor vehicle, motorcycle, utility, road or boat trailer, boat and motors, camper, travel trailer, aircraft, motor homes, etc. Each item is a separate count. **Do not** multiply this factor by any factor if you prorate or bill more than once a year.
42. **NUMBER OF PERSONAL PROPERTY REGISTRATION RENEWALS:** If your office serves as the point of registration for personal property, enter the number of the following kinds of property registration renewals in your jurisdiction: count each separate motor vehicle, motorcycle, road or boat trailer, boat, camper, travel trailer, aircraft, and motor home. Each item is a separate count. **This number would include renewals requiring interaction with your office via mail or other confirmation. Include decals or registration fees if sold or assessed by your office. This does not include automatic downloads or rollovers.**
43. **NUMBER OF PERSONAL PROPERTY NEW REGISTRATIONS:** If your office serves as the point of registration for personal property, enter the total number of the following kinds of property new registrations in your jurisdiction: count each separate motor vehicle, motorcycle, road or boat trailer, boat, camper, travel trailer, aircraft, and motor home. Each item is a separate count. **Requires interaction with your office by mail, phone or in person. Do not include registrations added automatically through a download.**
44. **NUMBER OF PERSONAL PROPERTY REGISTRATION DELETIONS:** If your office serves as the point of registration for personal property, enter the total number of the following kinds of property registrations that were deleted in your jurisdiction: count each separate motor vehicle, motorcycle, road or boat trailer, boat, camper, travel trailer, aircraft, and motor home. Each item is a separate count. **Requires interaction with your office by mail, phone or in person. Do not include registrations added automatically through a download.**
45. **NUMBER OF PERSONAL PROPERTY PRORATION ASSESSMENTS:** If your office prorates personal property enter the total number of vehicles assessed for personal property on a monthly prorated basis. **Include only those bought, sold, moved in or moved out.**
46. **A. NUMBER OF PERSONAL PROPERTY TAX RELIEF ACT (PPTRA) COMPLIANCE:** Enter the total number of assessments subject to PPTRA compliance audit. **This should equal the total number of vehicles in your locality that were qualified. Do Not** include vehicles adjusted (see current workload definition "Number of Tax Assessments Adjusted..." and proposed workload definition "Number of Personal Property Registrations").  
**B. NUMBER OF PERSONAL PROPERTY TAX ACCOUNTS REVIEWED FOR PPTRA COMPLIANCE:** Enter the total number of personal property tax accounts reviewed for PPTRA compliance (i.e. Schedule "C's", business trade name registrations, etc.). **Do Not** include vehicles adjusted (see current workload definition "Number of Tax Assessments Adjusted..." and proposed workload definition "Number of Personal Property Registrations").

**Option #7, Record Workload Information**  
**Option #3 Annual Screens**

TSOSNP - EXTRA! X-treme

MCBH-F COIN BUDGET REQUEST 10/26/2009 11:51  
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2007	2008	2009	AVG
INCOME TAX:				
37. STATE TAX RETURNS PROCESSED	9085	9261	_____	9173
38. ESTIMATED STATE TAX ASSESSMENTS	1593	1655	_____	1624
39. TAXPAYERS ASSISTED WITH STATE INCOME TAX	1000	1000	_____	1000
40. STATE TAX RETURNS PREPARED	40	200	_____	120
PERSONAL PROPERTY AND MACHINERY & TOOLS:				
41. PERSONAL PROPERTY ASSESSEMENTS	123489	120838	_____	122164
42. PERSONAL PROPERTY REGISTRATION RENEWALS	59165	59244	_____	59205
43. PERSONAL PROPERTY NEW REGISTRATIONS	26510	23917	_____	25214
44. PERSONAL PROPERTY REGISTRATION DELETIONS	25254	19222	_____	22238
45. PERSONAL PROPERTY PRORATION ASSESSMENTS	51640	43078	_____	47359
46.A. PPTRA COMPLIANCE	85852	82830	_____	84341
46.B. PERS PROP TAX ACCTS FOR PPTRA COMPLIN	3700	3500	_____	3600
47. PERS PROP VEHICLES R/FOR DMV PPTRA DUPL	0		_____	0
48. MOTOR VEHICLE RECORDS REV FOR PPTVR QUAL		0	_____	0
49. ISSUANCE OF 'NO FEE' MOTOR VEH DECALS	0	0	_____	0
I0048 RECORD UPDATED SUCCESSFULLY				
F1=HELP	F3=MENU	F7=PRV	F8=NXT	F12=MAIN

4B :00.1 08/63

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47. **NO DATA RECORDED**
48. **NUMBER OF QUALIFYING VEHICLE ASSESSMENTS REVIEWED IN ORDER TO DETERMINE THE PERCENTAGE OF PERSONAL PROPERTY RELIEF OFFERED TO TAXPAYERS**
49. **NUMBER OF MOTOR VEHICLE "NO FEE" DECALS ISSUED (EX., MILITARY PERSONNEL OR OWNERSHIP TRANSFERS).**



## Option #7, Record Workload Information Option #3 Annual Screens

Screen 5 of 6

RECORD WORKLOAD INFORMATION - ANNUALLY		2007	2008	2009	AVG
50.A. MOTOR VEHICLE LICENSE DECALS SOLD		0	0		0
50.B. MOTOR VEHICLE LICENSE FEES ASSESSED			0		0
51. PUBLIC SERVICE CORP ASSESSED		28	28		28
52. ACCTS (MACHINERY/TOOL/PERS PROP/FARM)		5051	5177		5114
53. MOBILE HOME ASSESSMENTS		3628	3585		3607
REAL ESTATE:					
54.A. PARCELS OF LAND		44187	45076		44632
54.B.(1) REAL ESTATE ASSESSMENTS IN-HOUSE		0	0		0
54.B.(2) REAL ESTATE ASSESSED CONTRACT BASIS		44187	0		22094
54.C. MAPPING CHGES OR GIS UPDTS COMPLETE		1074	1013		1044
54.D. REAL ESTATE TRANSFERS		4117	3394		3756
54.E. REASSESSMENTS/NEW CONSTRUCTION		2144	466		1305
DMV LICENSING AGENCY:					
55. NUMBER OF TITLES PROCESSED FOR DMV		0	0		0
56. NUM OF TRANS W/FEES COLLECTED FOR DMV		0	0		0

I0048 RECORD UPDATED SUCCESSFULLY  
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN

48 :00.1 07/63

50. **A. NUMBER OF MOTOR VEHICLE LICENSE DECALS SOLD.**

50 b. **NUMBER OF MOTER VEHICLE LICENSE FEES ASSESSED**

51. **NUMBER OF PUBLIC SERVICE CORPORATIONS THAT ARE ASSESSED:** Enter the number of Public Service Corporations and Railroad companies that are assessed and that can be verified with the State Corporations Commission and the Department of Taxation.
52. **NUMBER OF MACHINERY AND TOOLS, BUSINESS PERSONAL PROPERTY AND FARM ACCOUNTS:** Enter the total number of manufacturing machinery and tools, business personal property and farm accounts that you assess. **Do not** multiply this figure by any factor if you prorate or bill more than once a year.
53. **NUMBER OF MOBILE HOME ASSESSMENTS:** Enter the total number of mobile homes that you treat as personal property. **Do not** multiply this figure by any factor if you prorate or bill more than once a year.

**Real Estate**

54. **A. NUMBER OF PARCELS OF LAND:** If your office assesses real estate, enter the total number of parcels of real estate, taxable and non taxable. **Do not** multiply this figure by any factor if you prorate or bill more than once a year.
- B. (1) NUMBER OF REAL ESTATE ASSESSMENTS CONDUCTED IN-HOUSE ANNUALLY DURING YOUR LOCALITY'S GENERAL REASSESSMENT:** If your office oversees the real estate assessment and conducts the general reassessment enter the number of real estate parcels assessed annually from the Assessor's General Reassessment Workload Achievement Log. (If you complete more than one log i.e. mineral accounts, land use accounts and land parcels, add the total for all logs and enter.)
- (2) NUMBER OF REAL ESTATE PARCELS ASSESSED ON A CONTRACT BASIS DURING YOUR LOCALITY'S GENERAL REASSESSMENT:** If your office hires an independent appraiser to assess real estate for your general reassessment enter the number of real estate parcels assessed.
- C. NUMBER OF MAPPING CHANGES OR GIS UPDATES COMPLETED.**
- D. NUMBER OF REAL ESTATE TRANSFERS:** If your office handles real estate, enter the total number of transfers of parcels for the year.
- E. NUMBER OF REASSESSMENTS DUE TO NEW CONSTRUCTION:** If your office assesses new construction, enter the total number of assessments adjusted due to new construction. **Do not** enter the total number of building permits. **Do not** enter the number of visits to a property for measurements and listings.

**DMV Licensing Agency**

55. **NUMBER OF TITLES PROCESSED FOR DMV AS A DMV LICENSING AGENT:** If your office serves as a DMV Licensing Agent, enter the 1) total number of vehicle titles, (original, substitute and replacement including title maintenance or change of title information); 2) vehicle registration (original, renewal, transfer, re-issue or surrender) transactions; 3) special and personalized license plate requests processed; 4) Driver Transcript Record requests processed. Each item (titles, registrations, plate requests, transcripts) is a separate count.
56. **TOTAL NUMBER OF TRANSACTIONS WHERE FEES ARE COLLECTED FOR DMV AS A DMV LICENSING AGENT**

## Option #7, Record Workload Information Option #3 Annual Screens

Screen 6 of 6

MCBI-A COIN BUDGET REQUEST 10/26/2009 11:53  
 V.12102008 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION - FTE TOTALS  
 APRIL (BEFORE ALLOCATIONS)

TOTAL FULL TIME	BUDGET REDUCTION FTE	FTE TOTAL	FTE REQUIRED	FTE DIFFERENCE	WEIGHTED
0	0.00	0.00	7.95	7.95	13746.52

NEED PERCENT REQUEST NEW  
 0

F1=HELP F2=AUTH BUDGET F3=MENU F4=TOTALS F7=PREV F12=MAIN

4B :01.9 01/01

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This screen shows the following information based on the data enter during the budget request process:

- Total Full Time- The total full time employees currently in the office
- Budget Reduction FTE- The FTE adjustment made to current CB FTE and is based on the actual salary amounts reduced as a result of budget reductions divided by the average salary of a position.
- FTE Total- The total number of Full Time equivalent positions this office has
- FTE Required- According to the workload information they have submitted and the weights attached to each workload, this is how many full time positions this office should have.
- FTE Difference- The difference between the FTE Total and FTE Required
- Weighted- The weighted workload is the combined result of multiplying the 3-year average of each workload item by their applicable weights.
- Need Percent- The percent of need for your office
- Requested New- The number of new positions requested



### Option #7, Record Workload Information

Commissioner's Workload Elements		Weighted Factor
<b>Adjustments:</b>		
1A	Number of Real Estate Tax Assessments Adjusted	0.37
1B	Number of Business License Assessments Adjusted	0.44
1C	Number of Personal Property Assessments Adjusted	0.08
1D	Number of Business Personal Property Assessments Adjusted	0.50
1E	Number of Merchant's Capital Assessments Adjusted	0.31
1F	Number of Machinery & Tools Assessments Adjusted	0.83
1G	Number of Excise Tax Assessments Adjusted	0.66
1H	<b>Number of Personal Property License Fees Adjusted</b>	<b>0.00</b>
<b>Audits &amp; Appeals:</b>		
2	Number of applications received for tax relief, real estate, personal property, disabled, etc.	0.30
3	Number of business license desk audits	0.51
4	Number of business license field audits	1.58
5	Number of personal property desk audits	0.05
6	Number of personal property field audits	0.74
7	Number of merchant's capital desk audits	0.13
8	Number of merchant's capital field audits	0.98
9	Number of business personal property desk audits	0.29
10	Number of business personal property field audits	6.93
11	Number of machinery & tools desk audits	0.90
12	Number of machinery & tools field audits	6.34
13	Number of excise tax desk audits	0.75
14	Number of excise tax field audits	5.03
15	Number of local business license appeals	7.19
16	Number of state business license appeals	22.19
17	Number of local merchant's capital appeals	0.76
18	Number of merchant's capital state appeals	1.43
19	Number of local business personal property appeals	1.73
20	Number of state business personal property appeals	0.19
21	Number of local machinery & tools appeals	4.96
22	Number of state machinery & tools appeals	0.19
23	Number of local excise tax appeals	26.95
Commissioner's Workload Elements		Weighted Factor
24	Number of state excise tax appeals	0.19
25	Number of local real estate tax appeals	0.63
26	Number of state real estate tax appeals	1.30
<b>Business Licenses, Merchants Capital &amp; Excise:</b>		
27	Number of Business Licenses Issued and Merchants Capital Accounts	0.27
28	Number of Applications Processed for Land Use Taxation and Rollback Assessments	0.21

**CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE**

29	Number of Business Accounts Assessed for Excise Taxes	0.68
30A	Number of Financial Institutions in Your Locality	0.98
30B	Number of Financial Institutions with their main office in your locality that are required to file the bank franchise tax with your office	1.74
31	Number of coal/gas severance tax, coal road tax, oil severance tax and mineral tax accounts	0.25
<b>General Administrative &amp; Legal:</b>		
32	General administrative duties	0.00
33	Number of summons	0.00
34	Number of criminal failure to file complaints	0.00
35	Number of workman's compensation affidavits	0.06
36	Number of pilot programs	0.00
<b>Income Tax:</b>		
37	Number of state income tax returns processed by your office	0.12
38	Number of state tax assessments for annual estimated income taxpayers	0.15
39	Number of taxpayers assisted with state income tax	0.18
40	Number of state tax returns prepared	0.40
<b>Personal Property and Machinery &amp; Tools:</b>		
41	Number of personal property Assessments	0.03
42	Number of personal property registration renewals	0.02
43	Number of personal property new registrations	0.06
44	Number of personal property registration deletions	0.03
45	Number of personal property proration assessments	0.00
46A	Number of personal property tax relief act (PPTRA) compliance	0.01
46B	Number of personal property tax accounts reviewed for PPTRA compliance	0.04
47	Number of personal property vehicles researched for the DMV PPTRA duplication report	0.20
48	<b>Number of motor vehicle records reviewed for personal property tax relief qualification</b>	0.00
49	Number of motor vehicle "no fee" decals issued (ex. Military personnel or ownership transfers)	0.00
50A	Number of motor vehicle license decals sold	0.00
50B	Number of motor vehicle license <b>fees assessed</b>	0.00
51	Number of public service corporations that are assessed	0.65
52	Number of machinery and tools, business personal property and farm accounts	0.15
53	Number of mobile home assessments	0.08
<b>Real Estate:</b>		
54A	Number of parcels of land	0.03
<b>Commissioner's Workload Elements</b>		<b>Weighted Factor</b>
54B1	Number of real estate assessments conducted in-house annually during your locality's general assessment	0.06

**CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE**

54B2	Number of real estate parcels assessed on a contract basis during your localities general assessment	0.01
54C	Number of mapping changes or GIS updates completed	0.35
54D	Number of real estate transfers	0.41
54E	Number of reassessments due to new construction	0.90
<b>DMV Licensing Agency:</b>		
55	Number of titles processed for DMV	0.25
56	Total number of transactions for which fees are collected for DMV	0.07

Staffing Need =	$y = 1.3074 + 0.0005x + -2e-9x^{1.95}$
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## 10. Option #8 – Update Locality Information

### Purpose:

This screen will be displayed when 'Option #8, Update Locality Information' is selected on the Budget Request Menu. This screen is available for updating the locality address, phone, and fax numbers. It is also used to advise the Compensation Board staff of appropriate contacts for questions regarding the budget request, personnel processing, and reimbursement processing.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #8, Update Locality Information

```

COIN
QW53270 Edit View Options Tools Help
MCS2 COIN SYSTEM MAINTENANCE 11/26/2018 14:59
V.11132017 LOC: 013 OFF: 771 ARLINGTON COUNTY

UPDATE LOCALITY/OFFICE INFORMATION

LOCALITY INFORMATION
OFFICER....: INGRID H MORROY
TITLE.....: COMMISSIONER OF THE REVENUE
LOCALITY...: ARLINGTON COUNTY
ADDRESS....: 2100 CLARENDON BLVD. STE. 200
CITY.....: ARLINGTON
STATE.....: VA ZIP: 22201 - 5403
TELEPHONE...: 7032283033 EXT: 3033
FAX.....: 7032287048
OFFR EMAIL.: IMORROY@ARLINGTONVA.US

CONTACT PERSON
FULL NAME...: JACQUELINE JOHNSON BROWN
TELEPHONE...: 7032283021 EXT: 3021
EMAIL.....: JJOHNSONBROWN@ARLINGTONVA.US

F1=HELP F3=MENU F12=MAIN
Connected to s0100.vita.virginia.gov port 23 24/69 NUM 14:59:57 IBM-3278-2-E - TC1A0037
    
```

## Option #8 Update Locality Information

```

COIN
QW53270 Edit View Options Tools Help
MCS2 COIN SYSTEM MAINTENANCE 11/26/2018 14:59
V.11132017 LOC: 013 OFF: 771 ARLINGTON COUNTY

UPDATE LOCALITY/OFFICE INFORMATION

LOCALITY INFORMATION
OFFICER.....: INGRID H MORROY
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FAX.....: 7032287048
OFFR EMAIL..: IMORROY@ARLINGTONVA.US

CONTACT PERSON
FULL NAME...: JACQUELINE JOHNSON BROWN
TELEPHONE...: 7032283021 EXT: 3021
EMAIL.....: JJOHNSONBROWN@ARLINGTONVA.US

F1=HELP F3=MENU F12=MAIN
Connected to s0100.vita.virginia.gov port 23 24/69 NUM 14:59:57 IBM-3278-2-E - TC1A0037

```



## 11. Option #9, Special Program Certification

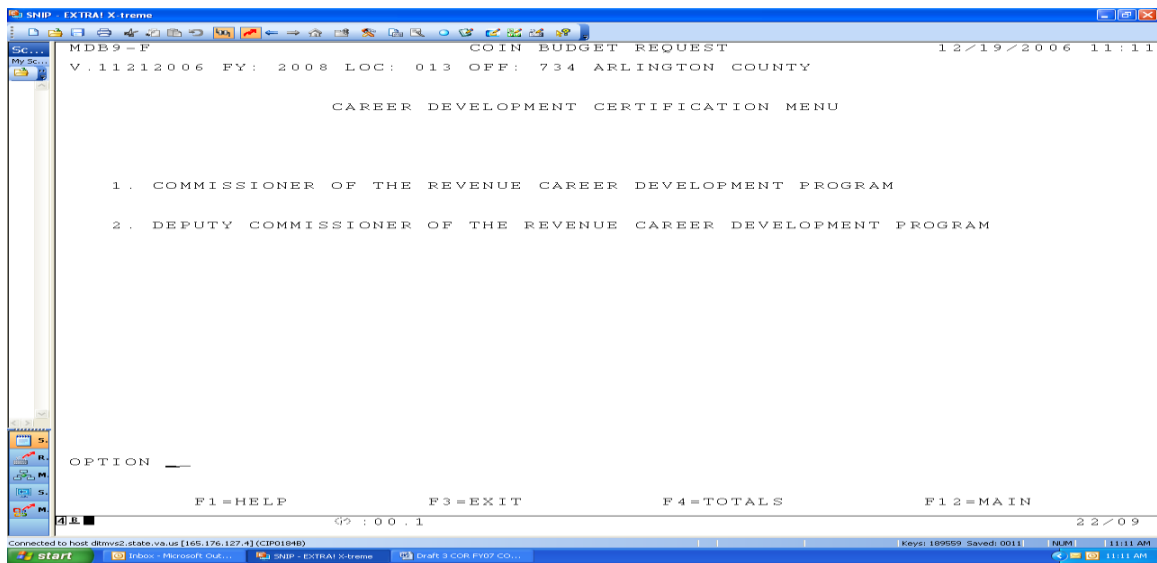
### Purpose:

Specified Certification Programs are accessed from the COIN Budget Request menu. The program will determine based on locality and office which special programs to display.

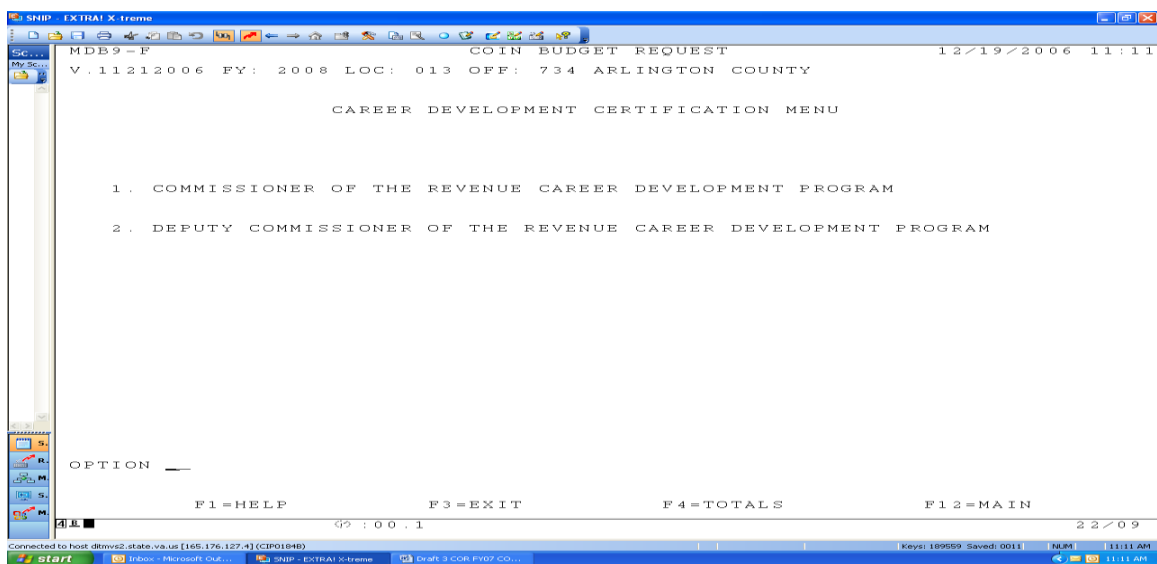
- **Commissioners of the Revenue Career Development Program**
  - If the **Commissioner of the Revenue is not certified** you **must** answer the question "Commissioner meets all Criteria of CDP Y/N" with "N" for No and signoff on the program. This verifies that the screen was viewed by each office.
  - If the Commissioner of the Revenue has already received their increase they **must** re-apply for career development **each year** by completing the Commissioner of the Revenue Career Development Certification in COIN by February 1 to maintain the CDP increase.
  - The Officer must adopt the Deputy Commissioner Career Development Program to be eligible for participation in the Commissioner of the Revenue Career Development Program.
  - Do not enter the Commissioner's name on this screen.
- **Deputy Commissioners of the Revenue Career Development Program**
  - ✓ The blanks on this screen are only for the names of Certified Deputy Commissioners, **not** deputies who are participating and enrolled.
  - ✓ Deputies that have already received their CDP increase **must** be entered on this screen **each year** to maintain the salary increase for the Career Development Program.

### Navigational Path:

- COIN Main Menu – Select #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #9, Special Program Certification



## Option #9, Special Program Certification



## Procedures:

- Read through each Special Program Certification Screen and if you comply with the program criteria as stated
  - ✓ List employees that participate in the Career Development Programs
  - ✓ Enter the Officer's SCB USERID as the Approval User-ID
- Option #1 Commissioner of the Revenue Career Development Program
- Option #2 Deputy Commissioner of the Revenue Career Development Program

## Option #9, Special Program Certification

### Option #1 Commissioner of the Revenue Career Development Program

Screen 1 of 7

SHIP - EXTRA! X-treme

File Edit View Tools Session Options Help

MCCF-A COIN BUDGET REQUEST 11/28/2007 15:40  
V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

I HEREBY CERTIFY THAT I HAVE MET OR EXCEEDED THE FOLLOWING CRITERIA:

A. I HAVE ACHIEVED CERTIFICATION FROM THE WELDON COOPER CENTER FOR PUBLIC SERVICE AT THE UNIVERSITY OF VIRGINIA.

B. I CERTIFY THAT 100% OF ALL WRITTEN APPEALS OF ASSESSMENT FOR BPOL RECEIVED BY MY OFFICE IN THE PAST 12 MONTHS WERE ISSUED A FINAL DETERMINATION WITHIN 90 DAYS FROM THE DATE OF RECEIPT OF ALL REQUESTED INFORMATION FROM THE ATTORNEY GENERAL, DEPARTMENT OF TAXATION AND CLIENT.

C. I CERTIFY THAT 100% OF ALL WRITTEN APPEALS OF ASSESSMENT OF TANGIBLE PERSONAL PROPERTY AND OTHER LOCAL OPTION TAX ASSESSMENTS RECEIVED BY MY OFFICE IN THE PAST 12 MONTHS WERE ISSUED A FINAL DETERMINATION WITHIN 90 DAYS FROM THE DATE OF RECEIPT OF ALL REQUESTED INFORMATION.

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

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Read and then Press 'F8' to proceed to the next page

Screen 2 of 7

SHIP - EXTRA! X-treme

File Edit View Tools Session Options Help

MCCF-B COIN BUDGET REQUEST 11/28/2007 15:40  
V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

I HEREBY CERTIFY THAT I HAVE MET OR EXCEEDED THE FOLLOWING CRITERIA:

D. I CERTIFY THAT I HAVE ESTABLISHED AND IMPLEMENTED, AND THAT I MAINTAIN, A PROFESSIONAL, UNIFORM, AND EQUITABLE ASSESSMENT POLICY IN ACCORDANCE WITH THE GUIDELINES PROVIDED IN THE COR CDP.

E. I CERTIFY THAT I HAVE ESTABLISHED AND IMPLEMENTED, AND THAT I MAINTAIN, AN OBJECTIVE AND SYSTEMATIC PROCESS OF DISCOVERING, ACCUMULATING AND EVALUATING FINANCIAL RECORDS AND OTHER EVIDENCE IN ORDER TO DETERMINE CONFORMITY OF AD VALOREM AND EXCISE TAX FILINGS WITH THE APPLICABLE STATE AND LOCAL LAWS.

F. I CERTIFY THAT I HAVE A WRITTEN CONFIDENTIALITY POLICY, AND THAT I HAVE ESTABLISHED A PROCESS FOR INVESTIGATING EMPLOYEE BREACHES OF CONFIDENTIALITY.

G. I CERTIFY THAT I HAVE A WRITTEN CUSTOMER SERVICE POLICY.

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

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Read and then Press 'F8' to proceed to the next page

## Option #9, Special Program Certification

Screen 3 of 7

MCCF-C COIN BUDGET REQUEST 11/28/2007 15:41  
V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

I HEREBY CERTIFY THAT I HAVE MET OR EXCEEDED THE FOLLOWING CRITERIA:

H. I CERTIFY ADHERENCE TO, AND PRACTICE OF, THE CODE OF ETHICS AND STANDARDS OF PROFESSIONAL CONDUCT OF THE IAAO.

I. I CERTIFY THAT I HAVE IMPLEMENTED A WRITTEN PROCEDURE FOR HANDLING FREEDOM OF INFORMATION REQUESTS.

J. I CERTIFY THAT I HAVE IMPLEMENTED A PROCESS OF DISCOVERING AND APPLYING UNIFORM PRACTICES FOR THE FILING, ABATEMENT AND APPEALS OF ALL LOCAL OPTION TAXES THAT ARE ASSESSED BY MY LOCALITY.

K. I CERTIFY THAT I HAVE DEVELOPED AND IMPLEMENTED WRITTEN POLICIES CONSISTENT WITH STATE AND FEDERAL LAW ADDRESSING LEAVE AND ATTENDANCE, EQUAL OPPORTUNITY, SEXUAL HARASSMENT, RECRUITMENT AND SELECTION AND EMPLOYEE DISCIPLINARY PROCEDURES OR ADOPTED LOCAL GOVERNMENT POLICIES THAT MEET THE SAME STANDARD.

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

Read and then Press 'F8' to proceed to the next page

Screen 4 of 7

MCCF-D COIN BUDGET REQUEST 11/28/2007 15:41  
V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

I HEREBY CERTIFY THAT I HAVE MET OR EXCEEDED THE FOLLOWING CRITERIA:

L. I CERTIFY THAT MY PERSONAL PROPERTY BOOK WAS PRESENTED TO THE TREASURER OF MY LOCALITY LISTING ALL ACCOUNTS THAT WERE ESTABLISHED BY SEPTEMBER 1 OF THIS YEAR OR WITHIN 90 DAYS FROM THE DATE THE RATE OF TAX ON PERSONAL PROPERTY WAS DETERMINED. (NOTE: IF THE DEPARTMENT OF TAXATION EXTENDED THE TIME OF DELIVERY FOR SUCH BOOKS, PLEASE SUBMIT CORRESPONDENCE PROVIDING VERIFICATION FOR THE EXTENSION.)

M. I CERTIFY THAT I HAVE IMPLEMENTED THE MINIMUM BASIC TECHNOLOGICAL METHODS AND PROCEDURES REQUIRED TO PERFORM THE DUTIES OF THE COMMISSIONER OF THE REVENUE. I FURTHER CERTIFY THAT I HAVE A WRITTEN PLAN IN PLACE TO OUTLINE IMPLEMENTATION OF THE OPTIONAL CRITERIA.

N. I CERTIFY THAT I HAVE ADOPTED THE COMPENSATION BOARD'S MINIMUM CRITERIA FOR EMPLOYEE EVALUATION PLANS, AND THE DEPUTY COMMISSIONER OF THE REVENUE CAREER DEVELOPMENT PLANS.

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

Read and then Press 'F8' to proceed to the next page



## Option #9, Special Program Certification

Screen 5 of 7

SNIP - EXTRA! X-treme

File Edit View Tools Session Options Help

MCCF-E COIN BUDGET REQUEST 11/28/2007 15:41

V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

I HEREBY CERTIFY THAT I HAVE MET OR EXCEEDED THE FOLLOWING CRITERIA:

O. I CERTIFY THAT I MEET THE MINIMUM CRITERIA FOR COR CDP AS ESTABLISHED HEREIN. I CERTIFY I PROVIDE THE FOLLOWING ADDITIONAL SERVICES:

- I CERTIFY THAT 100% OF ALL WRITTEN APPEALS OF ASSESSMENT FOR REAL ESTATE RECEIVED BY MY OFFICE IN THE PAST 12 MONTHS WERE ISSUED A FINAL DETERMINATION WITHIN 90 DAYS FROM THE DATE OF RECEIPT OF THE APPEAL.
- I CERTIFY THAT I HAVE ACCOMPLISHED THE FOLLOWING WITH RESPECT TO THE PROCESSING OF STATE INCOME TAX RETURNS:
  - \* MAINTAIN ACCESS TO THE DEPARTMENT OF TAXATION STATE TAX ACCOUNTING & REPORTING SYSTEM (STARS).
  - \* PROCESS STATE INCOME TAX RETURNS AND ESTIMATED INCOME TAX PAYMENTS AS REQUIRED PER DEPARTMENT OF TAXATION PROCEDURES PAMPHLET.
  - \* MET THE DISCLOSURE, SECURITY AND CONFIDENTIALITY REQUIREMENTS AS IMPOSED BY THE DEPARTMENT OF TAXATION.

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

4 0.1 01/01

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Read and then Press 'F8' to proceed to the next page

## Option #9, Special Program Certification

Screen 6 of 7

MCCF-F COIN BUDGET REQUEST 11/28/2007 15:41

V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

THE POPULATION OF MY LOCALITY IS: 192,900

I HEREBY CERTIFY THAT THE FOLLOWING EMPLOYEES ARE PARTICIPATING AND ENROLLED  
IN THE MASTER DEPUTY COMMISSIONER OF THE REVENUE PROGRAM ADMINISTERED BY THE  
WELDON COOPER CENTER FOR PUBLIC SERVICE.

LAST NAME	FIRST NAME
-----	-----
-----	-----
-----	-----
-----	-----
-----	-----
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-----	-----

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

1 2 / 0 6

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Enter the following information for deputies participating and enrolled in the Deputy Commissioner Program **if the officer is certified. If the officer is not certified do not enter any names.**

- Last Name
- First Name
- Press enter once all names have been entered to update and save your data

Press 'F8' to proceed with certification

### Helpful Hints

- ✓ Enrolled and Participating deputies are not required to be Compensation Board funded or in Compensation Board positions.
- ✓ DO NOT enter the Commissioner's name on this screen; it is for the names of deputies only.
- ✓ If the Commissioner is not certified for Career Development, make sure no names are added. This could prevent you from certifying your Special Programs and/or your Budget Request

## Option #9, Special Program Certification

Screen 7 of 7

MCCF-G COIN BUDGET REQUEST 11/28/2007 15:41

V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

I UNDERSTAND THAT I MUST SUBMIT THIS CERTIFICATION AS PART OF MY ANNUAL BUDGET REQUEST TO THE COMPENSATION BOARD BY FEBRUARY 1 OF EACH YEAR IN ORDER TO BE CONSIDERED FOR A PAY RAISE EFFECTIVE THE FOLLOWING JULY 1ST.

I AGREE TO PROVIDE SUCH DOCUMENTATION AS NECESSARY TO SUBSTANTIATE THIS CERTIFICATION UPON REQUEST OF THE COMPENSATION BOARD. MY GOVERNING BODY OR ANY INDIVIDUAL OR ORGANIZATION COVERED UNDER THE VIRGINIA FREEDOM OF INFORMATION ACT. I UNDERSTAND THAT I WILL HAVE SEVEN CALENDAR DAYS TO RESPOND TO COMPENSATION BOARD REQUESTS, AND THAT FAILURE TO RESPOND WITHIN THE TIME LIMIT WILL RESULT IN MY APPLICATION FOR CERTIFICATION BEING DENIED FOR THAT YEAR. I HAVE PROVIDED A COPY OF THIS CERTIFICATION TO MY GOVERNING BODY.

COMMISSIONER MEETS ALL CRITERIA OF THE CDP (Y/N): \_

APPROVAL: \_\_\_\_\_ OFFICER APPROVAL USER-ID: \_\_\_\_\_

NAME: \_\_\_\_\_

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

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- Enter a 'Y' or 'N' for "Commissioner meets all criteria for CDP".
- Enter the Officer's SCB USERID to certify

### Helpful Hints

- If the Commissioner is **not certified** you **must** answer "N" to the question "Commissioner meets all criteria of CDP".

## Option #9, Special Program Certification

### Option #2 Deputy Commissioner of the Revenue Career Development Program

Read through each screen to determine compliance with Compensation Board Minimum Standards for Deputy Commissioner Career Development Program.

Screen 1 of 5

MCCG-A COIN BUDGET REQUEST 11/28/2007 15:42  
V.01292007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

CERTIFICATION OF CAREER DEVELOPMENT FOR DEPUTY COMMISSIONERS OF THE REVENUE

I HEREBY CERTIFY THAT THE CAREER DEVELOPMENT PLAN FOR DEPUTY COMMISSIONERS OF THE REVENUE CURRENTLY IN EFFECT FOR THIS OFFICE MEETS THE MINIMUM CRITERIA FOR SUCH PLANS AS ESTABLISHED BY THE COMPENSATION BOARD AND INCORPORATES THE FOLLOWING CRITERIA:

A. PARTICIPATION IN AN EMPLOYEE EVALUATION PLAN MEETING THE MINIMUM CRITERIA ESTABLISHED BY THE COMPENSATION BOARD;

B. COMPETITIVE SELECTION PROCESS IN WHICH THE COR MAKES THE FINAL DECISION REGARDING SELECTION;

C. MINIMUM LENGTH OF SERVICE REQUIREMENT OF THREE YEARS AS AN EMPLOYEE IN THE OFFICE IN WHICH APPOINTMENT IS SOUGHT;

D. JOB PERFORMANCE INCLUDING TWO CONSECUTIVE ANNUAL EVALUATIONS THAT MEET ABOVE AVERAGE RATINGS;

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

Read and then Press 'F8' to proceed to the next page

Screen 2 of 5

MCCG-B COIN BUDGET REQUEST 11/28/2007 15:42  
V.01292007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

CERTIFICATION OF CAREER DEVELOPMENT FOR DEPUTY COMMISSIONERS OF THE REVENUE

I HEREBY CERTIFY THAT THE CAREER DEVELOPMENT PLAN FOR DEPUTY COMMISSIONERS OF THE REVENUE CURRENTLY IN EFFECT FOR THIS OFFICE MEETS THE MINIMUM CRITERIA FOR SUCH PLANS AS ESTABLISHED BY THE COMPENSATION BOARD AND INCORPORATES THE FOLLOWING CRITERIA:

E. NO WRITTEN REPRIMANDS WITHIN THE PAST TWO YEARS;

F. ACHIEVEMENT OF MASTER DEPUTY COR DESIGNATED BY THE WELDON COOPER CENTER FOR PUBLIC SERVICE, UNIVERSITY OF VIRGINIA, AND CONTINUING EDUCATIONAL REQUIREMENTS HAVE BEEN ESTABLISHED TO MAINTAIN CAREER DEVELOPMENT STATUS;

G. A LETTER OF RECOMMENDATION IS ON FILE FROM THE MDCR'S IMMEDIATE SUPERVISOR IF THAT PERSON IS SOMEONE ELSE THAN THE COR;

H. A PROCEDURE FOR THE REMOVAL OF DEPUTIES FROM THE CDP FOR INADEQUATE JOB PERFORMANCE, DISCIPLINARY ACTION, OR FAILURE TO MAINTAIN MINIMUM ADDITIONAL EDUCATIONAL REQUIREMENTS;

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

Read and then Press 'F8' to proceed to the next page

## Option #9, Special Program Certification

Screen 3 of 5

MCCG-C COIN BUDGET REQUEST 11/28/2007 15:42

V.01292007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

CERTIFICATION OF CAREER DEVELOPMENT FOR DEPUTY COMMISSIONERS OF THE REVENUE

I HEREBY CERTIFY THAT THE CAREER DEVELOPMENT PLAN FOR DEPUTY COMMISSIONERS OF THE REVENUE CURRENTLY IN EFFECT FOR THIS OFFICE MEETS THE MINIMUM CRITERIA FOR SUCH PLANS AS ESTABLISHED BY THE COMPENSATION BOARD AND INCORPORATES THE FOLLOWING CRITERIA:

I. EQUAL OPPORTUNITY FOR ALL DEPUTIES;

J. STATEMENT OF PURPOSE;

K. SCOPE OF THE PLAN;

L. UNDERSTANDING OF EMPLOYMENT STATUS AS A DCR;

M. POSITIONS ELIGIBLE FOR PARTICIPATION IN THE PLAN; AND

N. ADDITIONAL COMPENSATION

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

4 00.1 01/01

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Read and then Press 'F8' to proceed to the next page

## Option #9, Special Program Certification

Screen 4 of 5

MCCG-F COIN BUDGET REQUEST 11/28/2007 15:42

V.01292007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

CERTIFICATION OF CAREER DEVELOPMENT FOR DEPUTY COMMISSIONERS OF THE REVENUE

I HEREBY CERTIFY THAT THE FOLLOWING COMPENSATION BOARD FUNDED DEPUTY COMMISSIONERS MEET OR EXCEED THE CRITERIA SET FORTH IN C, D, E, AND F ABOVE A 9.3% SALARY INCREASE AS REQUESTED.

POSITION	LAST NAME	FIRST NAME
-----	-----	-----
-----	-----	-----
-----	-----	-----
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-----	-----	-----
-----	-----	-----
-----	-----	-----
-----	-----	-----
-----	-----	-----

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

11/06 00.1

Enter the following information for each employee who is a sworn Deputy Commissioner, occupies a permanent position in COIN, and for whom you seek a 9.3% pay increase **or any deputy who has already received the increase and is maintaining certification:**

- Position Number

Last and First Name will populate the blank next to position number based on the Current Information contained in COIN's Permanent Personnel tables once you hit 'ENTER' to process.

Press 'F8' to proceed to the next page

### Helpful Hints

- Only certified deputies should be on this page.
- This page **is not** for deputies that are simply participating and enrolled.
- Certified deputies who are currently in UNFUNDED positions are still included
- If your office does not have any certified and eligible deputies, make sure there are no names appearing on this screen. It could prevent you from certifying your Special Programs and/or your Budget Request

## Option #9, Special Program Certification

Screen 5 of 5

MCCG-G COIN BUDGET REQUEST 11/28/2007 15:43

V.01292007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

CERTIFICATION OF CAREER DEVELOPMENT FOR DEPUTY COMMISSIONERS OF THE REVENUE

I UNDERSTAND THAT I MUST SUBMIT THIS CERTIFICATION AS PART OF MY ANNUAL BUDGET REQUEST TO THE COMPENSATION BOARD BY FEBRUARY 1 OF EACH YEAR IN ORDER TO BE CONSIDERED FOR A PAY RAISE EFFECTIVE THE FOLLOWING JULY 1ST.

I AGREE TO PROVIDE SUCH DOCUMENTATION AS NECESSARY TO SUBSTANTIATE THIS CERTIFICATION UPON REQUEST OF THE COMPENSATION BOARD. MY GOVERNING BODY OR ANY INDIVIDUAL OR ORGANIZATION COVERED UNDER THE VIRGINIA FREEDOM OF INFORMATION ACT. I UNDERSTAND THAT I WILL HAVE SEVEN CALENDAR DAYS TO RESPOND TO COMPENSATION BOARD REQUESTS, AND THAT FAILURE TO RESPOND WITHIN THE TIME LIMIT WILL RESULT IN MY APPLICATION FOR CERTIFICATION BEING DENIED FOR THAT YEAR. I HAVE PROVIDED A COPY OF THIS CERTIFICATION TO MY GOVERNING BODY.

EMPLOYEES ARE ELIGIBLE FOR CDP INCREASE? (Y/N): \_

APPROVAL: OFFICER APPROVAL USER-ID: \_\_\_\_\_

NAME :

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

18/51

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Enter a 'Y' or 'N' for "Deputy is eligible for the CDP increase"

- Only use 'N' if you have no eligible deputies
- Enter the Officer's SCB USERID to certify
- Press 'Enter' to update and save your data.



## 12. Option #10 - Certify Budget Request

### Purpose:

The Certify Budget Request screen is accessed from the COIN Budget Request Menu. This screen enables the Local Officer to certify that the budget request is accurate and also enables the Compensation Board to approve that the budget request is within CB policy.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu - Select Option #10, Certify Budget Request

### COMMISSIONERS OF THE REVENUE

SNIP - EXTRA! X-treme

MCB8 COIN BUDGET REQUEST 12/19/2006 11:14

V.12062006 FY: 2008 LOC: 013 OFF: 734 ARLINGTON COUNTY

CERTIFY BUDGET REQUEST

I CERTIFY THAT THIS REPRESENTS AN ACCURATE STATEMENT OF OFFICE WORKLOAD DATA, SALARY SUPPLEMENTS, LOCALLY FUNDED POSITIONS, AND MY ANTICIPATED FUNDING NEEDS FOR THE UPCOMING FISCAL YEAR. I HAVE NOTIFIED THE GOVERNING BODY OF MY LOCALITY OF THE AVAILABILITY FOR REVIEW OF THE REQUEST AND HAVE PROVIDED THEM A COPY OF ALL DOCUMENTS AND JUSTIFICATION FORWARDED TO THE COMPENSATION BOARD.

APPROVAL:

LOCALITY: DATE: 12/19/2006 OFFICER LOGON: \_\_\_\_\_

CB : DATE: CB LOGON: \_\_\_\_\_

CB REVIEW (Y/N): \_

REMOVE SIGNOFF (Y): \_

MUST COMPLETE SPECIAL PROGRAMS CERTIFICATION BEFORE SIGN-OFF

F1=HELP F3=EXIT F4=TOTALS F12=MENU

16/51

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Keys: 109501 Saved: 0011 NUM 11:15 AM

### Helpful Hints:

- If you enter the Officer's SCB USERID to submit your budget request and all screens that have required fields have not been processed, the system will not accept your sign off
  - Under this condition, the system will inform you that a required process has not been completed and a message will direct you to the incomplete process selection on the On-line Budget Menu
- Once you have submitted your budget request you may not further modify your request
  - From the time of your submission, which is due February 1, you may only view your submission



**CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE  
BUDGET REQUEST (OLB)**

## Option #10, Certify Budget Request

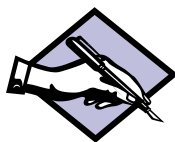
The screenshot shows a terminal window titled "SNIP - EXTRA! X-treme". The header bar displays "MCB8 COIN BUDGET REQUEST" and the date/time "12/19/2006 11:14". Below the header, the text "V.12062006 FY: 2008 LOC: 013 OFF: 734 ARLINGTON COUNTY" is visible. The main screen displays the title "CERTIFY BUDGET REQUEST" followed by a certification statement: "I CERTIFY THAT THIS REPRESENTS AN ACCURATE STATEMENT OF OFFICE WORKLOAD DATA, SALARY SUPPLEMENTS, LOCALLY FUNDED POSITIONS, AND MY ANTICIPATED FUNDING NEEDS FOR THE UPCOMING FISCAL YEAR. I HAVE NOTIFIED THE GOVERNING BODY OF MY LOCALITY OF THE AVAILABILITY FOR REVIEW OF THE REQUEST AND HAVE PROVIDED THEM A COPY OF ALL DOCUMENTS AND JUSTIFICATION FORWARDED TO THE COMPENSATION BOARD." Below this, there are fields for "APPROVAL:", "LOCALITY:", "DATE:", "OFFICER LOGON:", "CB:", and "CB LOGON:". The "DATE:" field is populated with "12/19/2006". There are also fields for "CB REVIEW (Y/N):" and "REMOVE SIGNOFF (Y):". At the bottom, a message states "MUST COMPLETE SPECIAL PROGRAMS CERTIFICATION BEFORE SIGN-OFF" followed by function key instructions: "F1=HELP F3=EXIT F4=TOTALS F12=MENU". The status bar at the bottom shows "Connected to host: dttmvs2.state.va.us [165.176.127.4] (CIP01048)", "Keys: 109501 Saved: 0011", and the time "11:15 AM".

### **Helpful Hints (Continued):**

- Upon approval of your budget on May 1, you will be able to view your budget submission as approved, which will include any adjustments made by the Compensation Board
- Please check your request for any final changes
  - If the Officer's SCB USERID has been entered, you cannot make changes to your Budget Request.
  - If your screen has error messages on the bottom of the screen, you have not Certified
    - Please go back to the 'Option' shown in the error on the bottom of your screen and complete the required fields, and then return to the certification screen to certify your budget request

### **Procedures:**

- Enter the officer's SCB USERID as the 'Officer Logon' to Certify fiscal year budget submission
- Press the "Enter" key after completing the information requested
- Press 'F3' to exit the screen to the Budget Request Menu



### 13. Option #11, Comments

#### PURPOSE:

The Comments screen is accessed from the COIN Budget Request Menu. This screen allows comments by any local officer or Compensation Board representative.

#### NAVIGATIONAL PATH:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #11, Comments

#### COMMISSIONER'S OF THE REVENUE

#### HELPFUL HINTS:

- There are unlimited 'Comment' screens that allow the entry of comments in a free form format
- This screen will Time Out if your computer is idle for 15 minutes
  - Suggest that you have all the information needed before starting this process
- The use of these screens is optional and the data entered is not edited
- This screen is available for any information you think is necessary for the Compensation Board to know about your on-line budget request

#### PROCEDURES:

- Enter "A" to add a comment or "D" to delete a comment
- Input the information you want to address
- Press the "Enter" key after your comments have been entered
- Reference the section of the on-line budget request your comments are referring to
  - Example: Option #2, Additional Employee Request
- Press 'F3' to exit the screen to the Budget Request Menu



## 14. Function Key 'F4' - Budget Request Totals

### PURPOSE:

The 'F4=Totals' Function Hot Key screen reflects your Budget Request Totals. These screens capture your Current Budget, Budget Requested Totals and Compensation Board Approved Budget for the next fiscal year that will be displayed by May 1 of each year. The categories captured within these screens are Permanent Personnel, Additional Personnel, Temporary Personnel, Office Expenses and Equipment.

### NAVIGATIONAL PATH:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Function Key 'F4'

MCBB-A COIN BUDGET REQUEST 12/19/2006 11:15  
V.10262006 FY: 2008 LOC: 013 OFF: 734 ARLINGTON COUNTY

BUDGET REQUEST TOTALS

PERMANENT PERSONNEL

	BUDGET SALARY	-ESTIMATED FRINGES	BUDGET- TOTAL	REIM SALARY	-ESTIMATED FRINGES	REIM- TOTAL
CURR BDGT	806,871	92,225	899,096	442,414	50,567	492,981
REQUESTED	806,871	92,225	899,096	442,414	50,567	492,981
COMP BOARD	0	0	0	0	0	0
TOTAL PERMANENT PERSONNEL:			19			

TEMPORARY PERSONNEL

	BUDGET SALARY	-ESTIMATED FRINGES	BUDGET- TOTAL	REIM SALARY	-ESTIMATED FRINGES	REIM- TOTAL
CURR BDGT	0	0	0	0	0	0
REQUESTED	0	0	0	0	0	0
COMP BOARD	0	0	0	0	0	0

F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU  
02/17

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### HELPFUL HINTS:

- The Budget Request Totals are displayed on three screens
  - Screen #1 displays the totals for Permanent and Temporary Personnel funding requests
  - Screen #2 displays the totals for Equipment funding requests
  - Screen #3 displays the totals for all budget request categories
- To navigate through the screens use the 'F7' key to view a previous page or 'F8' to view the next page
- This screen can be accessed from any Budget Request screen by depressing the 'F4' key
- Pressing the 'F3' key will return you to the screen from which you accessed the Budget Request Totals screen.

## 'F4' Budget Request Totals

### COMMISSONERS OF THE REVENUE

#### 1<sup>ST</sup> SCREEN OF 3:

MCBB-A COIN BUDGET REQUEST 12/19/2006 11:15

V.10262006 FY: 2008 LOC: 013 OFF: 734 ARLINGTON COUNTY

BUDGET REQUEST TOTALS

PERMANENT PERSONNEL

	BUDGET	-ESTIMATED	BUDGET-	REIM	-ESTIMATED	REIM-
	SALARY	FRINGES	TOTAL	SALARY	FRINGES	TOTAL
CURR BDGT	806,871	92,225	899,096	442,414	50,567	492,981
REQUESTED	806,871	92,225	899,096	442,414	50,567	492,981
COMP BOARD	0	0	0	0	0	0
TOTAL PERMANENT PERSONNEL:		19				

TEMPORARY PERSONNEL

	BUDGET	-ESTIMATED	BUDGET-	REIM	-ESTIMATED	REIM-
	SALARY	FRINGES	TOTAL	SALARY	FRINGES	TOTAL
CURR BDGT	0	0	0	0	0	0
REQUESTED	0	0	0	0	0	0
COMP BOARD	0	0	0	0	0	0

F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU

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Keys: 189586 Saved: 0011 NUM 11:15 AM

#### PROCEDURES:

##### • 1<sup>ST</sup> SCREEN OF 3:

- ✓ **'CURR BDGT'** – This line of information refers to the 'base' request information using your current budget information as of December 31<sup>st</sup>
- ✓ **'REQUESTED'** – This line of information refers to the budget request that you have made or are in the process of making
  - This information is subject to change as you make revisions to your budget request
  - This information becomes 'locked-in' when the Constitutional Officer or designee certifies their budget request
- ✓ **'COMP BOARD'** - This line of information refers to the budget request as being reviewed or approved by the Compensation Board
  - During the period of February – April budget requests made by the Constitutional Officers are reviewed and scrubbed by the Compensation Board
  - When budget requests are approved by the Compensation Board (May 1<sup>st</sup> of each year) this information also becomes 'locked-in'
- ✓ **'FRINGE'** benefits listed are estimates only
- ✓ **'REIMBURSABLE'** figures displayed are the actual dollar amounts that will be returned to your locality

## 'F4' Budget Request Totals

### COMMISSONERS OF THE REVENUE

#### 2<sup>ND</sup> SCREEN OF 3:

SNIP - EXTRA! X-treme

MCBB-B COIN BUDGET REQUEST 12/19/2006 11:15

V.10262006 FY: 2008 LOC: 013 OFF: 734 ARLINGTON COUNTY

BUDGET REQUEST TOTALS

NEW		REPLACE		TOTAL		STRESSED
QTY	COST	QTY	COST	QTY	COST	COST
0	0	0	0	0	0	0
0	0	0	0	0	0	0

EQUIPMENT TOTAL :

F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU

4 00.2 02/17

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Keys: 189586 Saved: 0011 NUM 11:16 AM

#### 2<sup>ND</sup> SCREEN OF 3:

- ✓ This screen displays equipment totals by equipment category
- ✓ **FIRST LINE** of information displayed relates to the request you have made or are in the process of making
  - This information is subject to change as you make revisions to your budget request
  - Line 1 becomes 'locked-in' when the Constitutional Officer certifies their budget request
- ✓ **SECOND LINE** of information displayed relates to the in-progress or approved request as completed by the Compensation Board
  - During the period of February – April budget requests made by the Constitutional Officers are reviewed and scrubbed by the Compensation Board
  - When budget requests are approved by the Compensation Board (May 1<sup>st</sup> of each year) this information also becomes 'locked-in'

## 'F4' Budget Request Totals

### COMMISSONERS OF THE REVENUE

#### 3<sup>RD</sup> SCREEN OF 3:

COIN BUDGET REQUEST			
12/19/2006 11:15			
V.10262006 FY: 2008 LOC: 013 OFF: 734 ARLINGTON COUNTY			
BUDGET REQUEST SUMMARY TOTALS			
TOTAL PERMANENT PERSONNEL..	CURR BDGT	806,871	REIMBURSABLE 442,414
	REQUESTED	806,871	442,414
	COMP BOARD	0	
TOTAL ADDITIONAL POSITIONS:	CURR BDGT	0	
	REQUESTED	0	
	COMP BOARD	0	
TOTAL TEMPORARY PERSONNEL..	CURR BDGT	0	REIMBURSABLE 0
	REQUESTED	0	0
	COMP BOARD	0	
TOTAL OFFICE EXPENSES.....	CURR BDGT	2,524	REIMBURSABLE 1,262
	REQUESTED	0	0
	COMP BOARD	0	
TOTAL EQUIPMENT EXPENSES...	CURR BDGT	0	REIMBURSABLE 0
	REQUESTED	0	0
	COMP BOARD	0	
F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU			
02/17			

#### • 3<sup>RD</sup> SCREEN OF 3:

- ✓ Displays totals for each budget request broad-based category:
  - Permanent Personnel
  - Additional Positions
  - Temporary Personnel Funding
  - Office Expense Funding
  - Equipment Requests
- ✓ '**CURR BDGT**' – This line of information refers to the 'base' request information using your current budget information as of December 31<sup>st</sup>
- ✓ '**REQUESTED**' – This line of information refers to the budget request that you have made or are in the process of making
  - This information is subject to change as you make revisions to your budget request
  - This information becomes 'locked-in' when the Constitutional Officer or designee certifies their budget request
- ✓ '**COMP BOARD**' - This line of information refers to the budget request as being reviewed or approved by the Compensation Board
  - During the period of February – April budget requests made by the Constitutional Officers are reviewed and scrubbed by the Compensation Board
  - When budget requests are approved by the Compensation Board (May 1<sup>st</sup> of each year) this information also becomes 'locked-in'

- Press 'F3' to exit the screen to the Budget Request Menu

## 15. Main Menu Option #5 Budget Reports

TSO1

QWS3270 Edit View Options Tools Help

MCG0 COIN BUDGET REQUEST 2013-11-14 12:44

V.06282013 FY: 2014 LOC: 001 OFF: 772 ACCOMACK COUNTY

OFFICE: COMMONWEALTH ATTORNEY OFFICER: AGAR

REPORTS MENU

1. MAY 1ST BUDGET
2. BUDGETS WITH ACROSS THE BOARD INCREASES
3. CURRENT ACTIVE BUDGET
4. BUDGET REQUEST WORKSHEET
5. BUDGET ROLL REPORT
6. MONTHLY REIMBURSEMENT REPORT

EXTR DATE: 10012013 MONTHS: 01

REPORT

SORTED BY

- CLASS
- POSITION NUMBER
- NAME

ENTER "X" FOR SORT ORDER

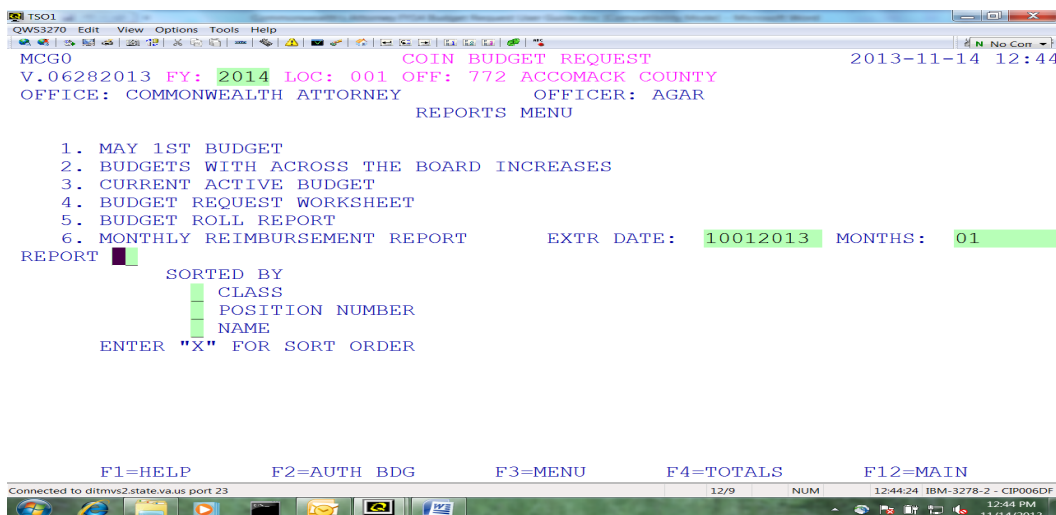
F1=HELP F2=AUTH BDG F3=MENU F4=TOTALS F12=MAIN

Connected to ditmvs2.state.va.us port 23 12/9 NUM 12:44:24 IBM-3278-2 - CIP006Df

12:44 PM 11/14/2013

- Select Option #5- "Reports"

## Main Menu Option #5 - Budget Reports



There are 6 versions of the Budget Report that are available.

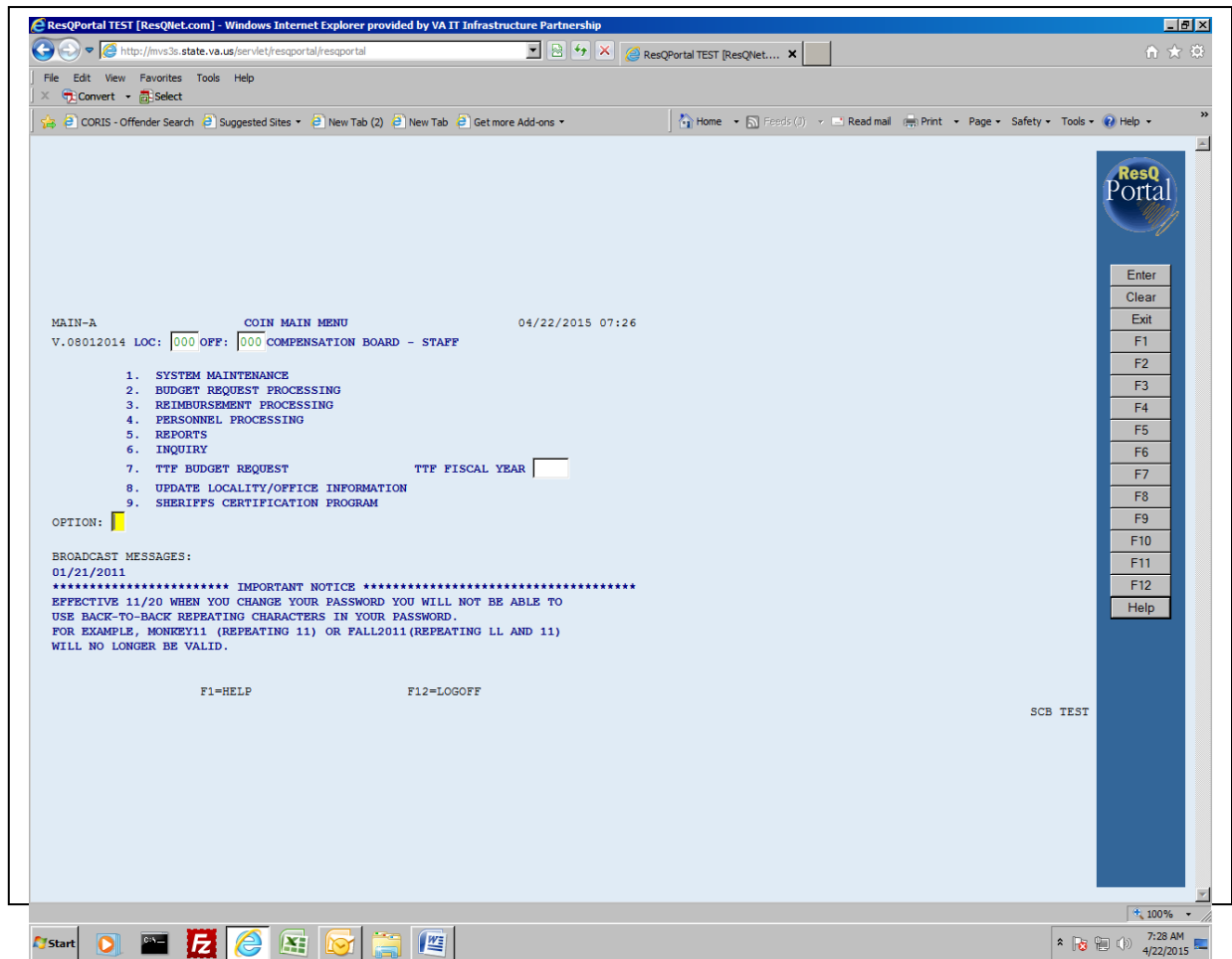
- Option #1 “May 1<sup>st</sup> Budget”- This is the Historical Budget Report, listing all changes to your budget since it went into effect.
  - Option #2 “Budget Report W/Aug. Increase”- This is the Budget with the August 1 increases factored in. This report is available in July.
  - Option #3 “Current Active Budget”– This is the Budget showing the personnel changes entered to date.
  - Option #4 “Budget Request Worksheet”- This is the Budget Request Worksheet, this report may be downloaded to enter all personnel changes before entering them into the COIN system.
  - Option #5 “Budget Roll”- This is the Budget as set on May 1<sup>st</sup> for the current Fiscal Year.
  - Option #6 “Monthly Reimbursement Report”- This report details the salary and fringe benefit amounts for each individual position. By selecting the date and number of months to be viewed, multiple months may be downloaded at one time.
1. Change the ‘FY’ to the new fiscal year or fiscal year desired
  2. Enter the desired Budget Report option
  3. Enter the sort option desired (if no sort sequence is specified the Budget Report will be printed in Class Code order). Governing Bodies will have the ability to request a Budget Report for each office in their locality. You will need to enter the Starting Office and Ending Office as well as the Sort Sequence. We recommend submitting a separate request for each office in your locality.
  4. Press Enter and print the screen
  5. **The name of the file to download will be displayed at the bottom of the screen.** Enter the name of the file in the download instructions #10



## 16. Download Instructions

### Downloading Budget Reports from COIN

#### Generating Reports in COIN



- Navigate to the COIN Main Menu; from the Main Menu, select option 5 (Reports) and press the 'Enter' key.

## Main Menu Option #5 – Reports

COIN BUDGET REQUEST 2018-06-15 08:14

V.01242018 FY: 2019 LOC: 001 OFF: 307 ACCOMACK COUNTY OFFICER: GODWIN

OFFICE: SHERIFF

REPORTS MENU

1. MAY 1ST BUDGET
2. BUDGETS WITH ACROSS THE BOARD INCREASES
3. CURRENT ACTIVE BUDGET
4. BUDGET REQUEST WORKSHEET
5. BUDGET ROLL REPORT
6. MONTHLY REIMBURSEMENT REPORT

EXTRA DATE: 05/01/2018 MONTHS: 01

REPORT 1

SORTED BY (ENTER "X" FOR SORT ORDER)

CLASS

☒ POSITION NUMBER

NAME

REPORTS WILL BE SENT BY E-MAIL. ENTER E-MAIL ADDRESS BELOW:

KHARRETT@CO.ACCOMACK.VA.US

F1=HELP F2=AUTH BDG F3=MENU F4=TOTALS F12=MAIN

SCB TEST

There are 6 reports that are available:

- **Option #1 “May 1<sup>st</sup> Budget”**- This is the Budget as typically approved by the Compensation Board during its April board meeting (note, the budget is approved at the June board meeting). This is the basis for the budget effective July 1 of that year. Note: Be sure to change **FY** at the top of the screen for the Budget “**ending**” year.
- **Option #2 “Budget Report with Across the Board Increases Increase”**- This report lists current positions and the salary increase, if any, as provided by the Appropriation Act. This report is available one month prior to the effective date of the salary increase.
- **Option #3 “Current Active Budget”**– This is the historical budget report, listing all changes to your budget since it went into effect.
- **Option #4 “Budget Request Worksheet”**- This is the Budget Request Worksheet, this report may be downloaded to enter all personnel changes before entering them into the COIN system.
- **Option #5 “Budget Roll Report”** – This is the Budget as it went into effect on July 1. This could differ from the May 1<sup>st</sup> Budget.
- **Option #6 “Monthly Reimbursement Report”** – This reports list all line items for a specified month’s reimbursement.

## Main Menu Option #5 – Reports

MC90 COIN BUDGET REQUEST 2018-06-15 08:14

V.01242018 FY: 2019 LOC: 001 OFF: 307 ACCOMACK COUNTY

OFFICE: SHERIFF OFFICER: GODWIN

REPORTS MENU

1. MAY 1ST BUDGET
2. BUDGETS WITH ACROSS THE BOARD INCREASES
3. CURRENT ACTIVE BUDGET
4. BUDGET REQUEST WORKSHEET
5. BUDGET ROLL REPORT
6. MONTHLY REIMBURSEMENT REPORT

EXTRA DATE: 05012018 MONTHS: 01

REPORT 1

SORTED BY (ENTER "X" FOR SORT ORDER)

CLASS

POSITION NUMBER

NAME

REPORTS WILL BE SENT BY E-MAIL. ENTER E-MAIL ADDRESS BELOW:

KBARRETT@CO.ACCOMACK.VA.US

F1-HELP F2-AUTH BDG F3-MENU F4-TOTALS F12-MAIN

SCB TEST

- Change the Fiscal Year to 2023 ( FY22 Approved Budget Report)
- Enter the report option (1-6)
- Enter the desired sort sequence, if no sort sequence is specified, the Budget Report will be printed in Class Code order.
- Change the default email address to the specific email address of the individual to receive the report

Governing Bodies have the ability to request a Budget Report for each office type in their locality by entering the office code on the COIN Main Menu, proceed to option 5 (reports) for each specific office type, and then follow the instructions above (307-Sheriffs/Superintendents; 717-Directors of Finance; 771-Commissioners of the Revenue; 772-Commonwealth's Attorneys; 773-Circuit Court Clerks; 774-Treasurers).

## **Technical Assistance**

Users with **Google-hosted email** may experience problems with receiving a file attachment in the email received from the COIN system. Instead, users with Google-hosted email may receive the budget report loaded into the body of the email. If you experience this problem (report contained in body of email and no file attachment received), please email one of the individuals listed below and notify them that you have experienced this specific problem. Please be sure to include your Locality number and your Office number in your email request so that we may assist you in receiving the budget report in a file attachment.

Bill Fussell – [william.fussell@scb.virginia.gov](mailto:william.fussell@scb.virginia.gov) (All Offices)  
Andy Waller – [andy.waller@scb.virginia.gov](mailto:andy.waller@scb.virginia.gov) (Treasurers, Finance Directors, Commonwealth's Attorneys)  
Star Puaauli – [Star.puaauli@scb.virginia.gov](mailto:Star.puaauli@scb.virginia.gov) (Commissioners and Clerks)  
Joan Bailey – [Joan.bailey@scb.virginia.gov](mailto:Joan.bailey@scb.virginia.gov) (Sheriffs/Superintendents)  
Brian Bennett – [brian.bennett@scb.virginia.gov](mailto:brian.bennett@scb.virginia.gov) (Sheriffs/Superintendents)  
Donna Foster – [donna.foster@scb.virginia.gov](mailto:donna.foster@scb.virginia.gov) (Sheriffs/Superintendents)  
Dan Munson – [dan.munson@scb.virginia.gov](mailto:dan.munson@scb.virginia.gov) (All Offices)

## 17. Salary Charts

### Classifications and Pay Plans

**CLASSIFICATION AND PAY PLAN FOR SUPPORT PERSONNEL OF THE COMMISSIONER OF THE  
REVENUE  
JULY 1, 2021 - JUNE 30, 2022**

CLASS TITLE	ABBREV	PAY BAND	ROLE	MIN	MAX*
GENERAL OFFICE CLERK CLERK TYPIST	GC, MGC CT, MCT	1	Administrative	23,012	43,310
TAX EXAMINER I DEPUTY I SECRETARY I	TEI, MTEI DI, MDI SECI, MSECI				
DEPUTY II SECRETARY II	DII, MDII SECII, MSECII	2	Sr. Administrative	27,494	52,925
MAPPING TECHNICIAN	MT, MMT				
DEPUTY III ADMINISTRATIVE ASSISTANT	DIII, MDIII AA, MAA	4	Professional	32,870	67,592
DEPUTY IV	DIV, MDIV				
CHIEF DEPUTY I	CDI, MCDI	7	Sr. Professional	39,271	88,280
CHIEF DEPUTY II	CDII, MCDII				
CHIEF DEPUTY III	CDIII, MCD3	8	Supervisory/ Management	51,062	134,838
CHIEF DEPUTY IV	CDIV, MCDIV				

M - denotes participation in Deputy Commissioners Career Development Program

\* Per Code of Virginia, §15.2-1627.1B, the salary of any employee of a Constitutional Officer cannot exceed 90% of the salary of the Constitutional Officer.